DOCUMENT RESUME

ED 329 288 IR 053 483

TITLE IFLA General Conference, 1990. Division of Education and Research: Section of Education and Training; Section of Library Theory and Research; Library History, Round Table; Research in Reading, Round Table; Editors of Library Journals, Round Table; and Continuing Professional Education, Round Table; Joint Workshop Papers. Booklet 7.

INSTITUTION International Federation of Library Associations, The Hague (Netherlands).

PUB DATE Aug 90

NOTE 187p.; Papers presented at the International Federation of Library Associations (IFLA) General Conference (56th, Stockholm, Sweden, August 18-24, 1990). Booklet 7 contains 13 papers, one of which is in Spanish. In addition, 8 papers are appended to this document.

PUB TYPE Speeches/Conference Papers (150)

LANGUAGE English; Spanish

EDRS PRICE MF01/PC08 Plus Postage.

DESCRIPTORS Academic Libraries; *Cultural Pluralism; *Distance Education; Foreign Countries; Foreign Students; Higher Education; Information Seeking; Library Catalogs; Library Education; *Library Research; Library Services; *Literacy Education; *Professional Continuing Education; Public Libraries; Reading Habits; Reading Research; Research Libraries; Study Facilities; *User Needs (Information)

ABSTRACT

The 21 papers in this collection were presented at the meetings of two sections and three round tables of the Division of Education and Research: (1) "Library and Information Services in Culturally Diverse Communities" (Cheryl Metoyer-Duran); (2) "Library Education in a Pluralistic Society" (Shmuel Sever); (3) "Each One an Individual: International Students in United States Library and Information Science Programs" (Julie Tallman); (4) "Instructing the User or Improving the System: Research and User Feedback for Interactive Library Catalogues" (Micheline Hancock-Beaulieu); (5) "La investigacion bibliotecologia en Mexico: por que, y para que" (Librarianship Research in Mexico: The Why and the What For) (Estela Morales); (6) "Scholars Seek Information: Information Seeking Behaviour and Information Needs of Humanities Scholars" (Harriet Lonnqvist); (7) "Bringing Rural Librarianship to Canada in the 1930s" (Maxine K. Rochester); (8) "Literacy and Reading in Iceland" (Darlene E. Weingand): (9) "Development in Reading in Yugoslavia" (Durda Mesic); (10) "The Possibility of Comparative Study on Children's and Young People's Reading Habits" (Jadwiga Hildengarda Kolodziejska); (11) "The Serial 'Librarianship and Bibliography Abroad' within the Professional Library Press System in the USSR" (Olga A. Diakonova and Olga V. Timokhina); (12) "The Study Circle Library in a Historical Perspective" (Lars Arvidson); (13) "In Search of the Informed Citizen: Study Circles as Bridges between Libraries and Learning" (Kenneth Abrahamsson); (14) "Need and Priority Areas for Continuing Education for Sub and Professional Information, Library and Archives Personnel in Tanzania" (Julità Nawe); (15) "The Continuum of Library Education: Maintaining Competence through the Professional Worklife" (Darlene E. Weingand); (16) "Continuing Education: An Australian Perspective" (Fay Nicholson and Angela Bridgland); (17) "Distance Education in Library and Information Science Education" (Fred W. Roper); (18) "Open and Distance Learning in Continuing Education" (Borje Holmberg); (19) "CPE (Continuing Professional Education) on the Management of Change in Academic and Research Libraries" (Riitta Makinen); (20) "U.S. Government Support for Continuing Professional Education for Librarians" (Anne J. Mathews and Thomas C. Phelps); and (21) "Adult Learning in Study Circles" (Henry Blid). (MAB)

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
☐ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

56th IFLA
GENERAL CONFERENCE
STOCKHOLM, SWEDEN
18–24 AUGUST 1990

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
A.L.Van Wesemael
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

ED329288

BOOKLET 7

DIVISION OF EDUCATION AND RESEARCH

SECTION OF EDUCATION AND TRAINING

Session 145 Wednesday 22 August 11:15–13:45

Library and Information Services in culturally diverse Communities (6-TRAIN-1-E)	Cheryl Metoyer-Duran, Graduate School of Library and Information Science, University of California Los Angeles, USA
Library Education in a pluralistic Society (53-TRAIN-4-E)	Shmuel Sever, Library and Department of Library Studies, University of Haifa, Mount Carmel, Haifa, Israel
Each one an Individual: international Students in United States Library and Information Science Programs (7-TRAIN-2-E)	Julie Tallman, School of Library and Information Science, University of Iowa, Iowa City, USA

SECTION OF LIBRARY THEORY AND RESEARCH

Session 124 Tuesday 21 August 15:00–17:30

Instructing the User or improving the System: Research and User Feedback for interactive Library Catalogues (76-THEOR-2-E)	Micheline Hancock-Beaulieu, Centre for Interactive Systems Research, Department of Information Science, City University, London, UK
La investigación bibliotecológia en México: por qué, y para qué (94-THEOR-3-S)	Estela Morales, Centro Universitario de Investigaciones Bibliotecológicas, Universidad Nacional Autónoma de México, México
Scholars seek Information: Information seeking Behaviour and Information needs of Humanities Scholars (65-THEOR-1-E)	Harriet Lönnqvist, Department of Library and Information Science, University of Åbo Akademi, Åbo, Finland

BEST COPY AVAILABLE

LIBRARY HISTORY. ROUND TABLE

Session 135 Wednesday 22 August 08:30–11:00

Bringing Rural Librarianship to Canada in the 1930s (16-LIBHI-1-E)	Maxine K. Rochester, School of Information Studies, Charles Sturt University, Wagga Wagga, Australia

RESEARCH IN READING. ROUND TABLE

Session 117 Tuesday 21 August 12:00–14:30

Literacy and Reading in Iceland (38-READ-1-E)	Darlene E. Weingand, School of Library and Information Studies, University of Wisconsin-Madison, Madison, USA
Development in Reading in Yugoslavia (39-READ-2-E)	Durda Mesic, Development and Research Department, National and University Library, Zagreb, Yugoslavia
The Possibility of comparative Study on Children's and young People's Reading Habits (40-READ-3-E)	Jadwiga Hildegarda Kolodziejska, National Library, Warsaw, Poland

EDITORS OF LIBRARY JOURNALS. ROUND TABLE

Session 106 Tuesday 21 August 09:00–11:30

The Serial *Librarianship and Bibliography Abroad* within the professional Library Press System in the USSR (18-RTELJ-1-E)	Olga A. Diakonova and Olga V. Timokhina, Department of International Library Relations, Lenin State Library, Moscow, USSR

CONTINUING PROFESSIONAL EDUCATION. ROUND TABLE

Session 95 Monday 20 August 10:30–13:00

The Study Circle Library in a historical Perspective (8-RTCPE-1-E)	Lars Arvidson, Adult Education Research Group, Department of Education and Psychology, Linköping University, Linköping, Sweden
In Search of the Informed Citizen: Study Circles as Bridges between Libraries and Learning (50-RTCPE-2-E)	Kenneth Abrahamsson, Swedish National Board of Education, Stockholm, Sweden

Library and Information Services in Culturally diverse Communities

Cheryl Metoyer-Duran, Ph.D.
Assistant Dean, Graduate School of Library and Information Science
University of California, Los Angeles, USA

Abstract

In the United States, especially in California, public libraries have had a strong tradition of seeking various ways to meet the information needs of the growing ethnic population groups: American Indians, Latinos, Asian Americans, and African Americans. This paper analyzed the existing body of literature concerning the provision of information services for these four groups. The analysis revealed that the literature clusters into the following: (1) articles and reviews of communication behavior; (2) surveys detailing the provision of culturally specific library services, programs and resources; (3) commentaries and studies on the training, placement and continuing education of library personnel who work with culturally diverse groups; and (4) analyses of the funding sources and issues associated with the provision of new programs or the maintenance of existing ones. It was found that Information and Referral programs were the most frequent means utilized to address the information needs of culturally diverse groups in the United States. It was also determined that in developing Information and Referral services and in measuring their effectiveness, the emphasis has been on determining the number of end-users effected by or benefitting from the services. While this data offered some measure of utility, the analysis indicated that the information needs of the targeted end-users have not been effectively met.

The need for a new model for delivering information services to ethnic groups was proposed. Such a model would focus on community based information gate-keepers as the targeted end-users of information in ethnic communities.

Additional research areas generated by the literature review and the results of personal interviews included: (1) Ethnic groups and the United States 1990 Census Data; (2) Communication and networking behavior of information gate-keepers; and (3) Information needs of knowledge workers. Consideration of these areas included a discussion of the implications of such research for library educators, information professionals and library administrators.

Two decades have passed since our profession generated the first wave of literature and early research on library services and information needs of culturally diverse people. Given the passage of twenty years, particularly since that period also saw the birth of the explosive Information Age, a reasonable assumption would be that our profession has made significant progress in relation to producing a more mature body of literature, evidencing major advancement and innovations associated with enhancing library and information services to culturally diverse people. It is therefore timely to (1) review the progress on national research conducted on services to the culturally diverse with special attention to research methodologies and service strategies; and (2) suggest a research agenda.

The paper focuses on the literature and programs associated with the four major culturally diverse groups in the United States: Afro-American, American Indian, Asian American, and Latino. Rather than re-engage in the semantic and definitional battles that characterized so

much of the previous dialogue on what constitutes the most appropriate term for a specific minority or cultural linguistic group, the terminology used in this paper is based on generally acknowledged terms that have gained acceptance over the last two decades.

Literature review: The quest for a progression

The bulk of the professional literature of the late 1960s and 1970s consists primarily of personal testimonials, collection building advice, and emotional pleas for services relating to the needs of minority people. The common testimonial threads are all too evident. The profession has produced some studies that do provide current and incisive compilations of the literature. Fisher provides a solid historical overview of the library research on Afro-Americans, American Indians, Asian Americans, and Mexican Americans, from pre-civil rights era to 1983.[1]

The following section builds from Fisher's work and identifies key areas still meriting research. The discussion also identifies what research has been done concerning these four ethnic groups. The purpose of this approach is to encourage scholars to build upon the existing research base. Research should not reamin fragmentary and non-cumulative.

Afro-Americans

Fisher identified topical areas meriting research. The following four areas still require scholarship and work that goes beyond mere testimonials. Additional research might examine the pre-civil rights era in Afro-American librarianship and associated services. Similarly, research from the civil rights era has not fully documented the Afro-American experiences of that time.[2,3]

There has been little, if any, analysis of the personal observations and efforts of Afro-American librarians. Individual projects reported in the literature are frequently presentend from a non-minority perspective. An additional area considered relevant for study and research includes the impact and use of various forms of media (print and non-print) on the Afro-American population. This type of communications research is still needed and would have valuable implications for librarians in all types of population settings.[4,5] Other elusive topics for research include the effect of Afro-American librarians in Anglo settings, Afro-American resources collected in those settings, and criteria for basic collections in those settings.

American Indians

Research on library services for the information needs of American Indians has been almost exclusively centered upon the events of the last 20 years.[6,7,8] In-depth research on historically available services and programs has been typically hampered by lack of adequate record keeping and data tracking by both service providers and funding agencies.[9] A thorough bibliography identifying successful programs, personal and professional observations and unsuccessful efforts with this indigenous population has yet to be developed.[10]

State-of-the-art research efforts on American Indians,[11] including the role of the federal, state and local government in funding and providing Indian library services,[12] need to be updated. Study of this unique funding relationship between American Indians and the federal government should be continued and significantly enhanced.[13]

Due to the issues associated with proper tribal designation and differentiation, classification issues and bibliographic automated access[14] concerns remain important areas for research. Publications of the National Indian Education Association's Library Project, which described the information needs of American Indians and the problems associated with meeting those needs[15] should be reassessed for current applicability. Similarly, investigation of

current attempts to meet the information needs of American Indians, such as the *Bureau of Indian Affairs Plan for the Improvement of Library, Media and Information Programs*[16] should be continued and updated.

Asian Americans

Library and information needs of Asian American population groups appear to be the least well documented area of library and information science research in relation to culturally diverse populations. This conclusion was validated in a special *First Needs Assessment*, commissioned by a Task Force of the National Commission on Library and Information Science.[17] Comparative analysis of library services (public and academic) for various Asian groups (Chinese, Japanese, Koreans, Vietnamese, etc.) has not been generally conducted and constitutes a primary opportunity for research. Studies have primarily examined services and programs for Chinese-Americans.[18 19 20]

Mexican Americans

The bulk of early information concerning library and information services to Mexican Americans is comprised chiefly of one-time reports of programs and personal observations.[21 22 23] Some of the key outcomes of public and academic library activities, including attention to academic and other resources hold great potential for additional research.[24 25 26]

A few comprehensive analyses of information needs of Mexican Americans have occurred in the last ten years.[27 28 29] There is general acceptance of the positive effects of the growing number of Mexican American librarians entering the field of librarianship,[30] but the real benefits have yet to be quantatively measured and reported.

Summary

There is a need to focus on the information needs of the culturally diverse within the context of their total community information environment. In addition, it is imperative that the library profession harness new technologies (including hardware, software and electronic communication capabilities) that can improve and enhance service to the culturally diverse.

Research agenda

The specific research topics are clustered under five broad headings. While not exhaustive or exclusive in composition, the suggested topics will hopefully elicit dialogue and serve as a seed bed to which other scholars can readily contribute.

Culturally diverse political representation

One area that has increased in importance relates to culturally diverse political representation. A prime subject to consider is the systematic analysis of the impact of legislative and lobbying efforts by culturally diverse elected officials with respect to funding and support programs. Similarly, there is a need to correlate the effect of culturally diverse representation on library boards.

1990 Census data

It would be beneficial to compare the actual utilization of hard information (problem-solving information) for ethnolinguistic groups, utilizing standard English versus indigenous formats.

Another timely research topic deals with the demographic implications of legal versus illegal immigration status in relation to the provision of library and information services. The 1990 census will certainly focus on this complex issue of 'legal' versus 'illegal' status.

Culturally diverse population growth

It is important to analyze our use of standard inquiry and response techniques utilized in library user studies, i.e., Are we asking the right questions? Another potentially fruitful area, would be to consider the impact and benefit of joint studies conducted by library researchers and cross-cultural research centers on language patterns and resource (print and non-print) utilization by ethnolinguistic groups (i.e., consider alliances with institutions such as the University of Texas Cross-Cultural Center).

Research is also needed on our profession's continued reliance on standardized procedures commonly used for determining output measures for public libraries in culturally diverse communities. We need to ask if standardized procedures and traditional modes of data analysis, equally apply to all populations? For example, is it valid to rate traditional book reading as more important than the use of fotonovellas by Latinos?

Electronic networking and computer literacy

Given the explosive proliferation of micro computers and associated peripherals, it is also appropriate to consider an analysis of the cognitive learning rates of culturally diverse students utilizing computer-based instruction. The opportunities for conducting rigorous research in this area are boundless.

Needs of knowledge workers

First, it would be useful to conduct comparative analyses of career pathing of culturally diverse librarians. A related topic deals with a longitudinal analysis of positions held by culturally diverse librarians. Another subject that requires attention is an analysis of the motivational determinates of former librarians: Why did they leave and where did they go? How are they doing? Finally, there is a need to study the information seeking behavior of culturally diverse professionals in business, health, industry, government and the educational sectors, to determine if significant differences exist between them and other professionals.

As already noted, the existing research base is noncumulative and fragmentary. This research agenda not only encourages the development of research that corrects this circumstance, but also directs the research and scholarship toward a common end, that being the development, testing, refinement, and implementation of a model for the more effective delivery of information services to culturally diverse groups.

Development of a model for information delivery

Public libraries in the United States have had a strong tradition of seeking various ways to meet the information needs of culturally diverse population groups. In developing reference and Information and Referral services and in measuring their effectiveness, the emphasis has been on determining the number of end-users effected by or benefitting from the service. While the data offer some measure of utility, the investigations, in essence, indicate that the information needs of these end-users have not been effectively met.

It is the purpose of the project entitled "Information Gate-keepers in California's Ethnic Communities" to provide a different model for delivering information and referral services to the information gate-keepers.[31] The proposed model is based on the assumption that the "end-users" of public libraries as defined in many of the studies of library effectiveness are not the library's true end-users. This study will investigate whether the people who most directly need and profit from information obtain it from community-based information gate-keepers, who are not typically identified as the library's end-users. In Latino, Asian and American Indian communities, these gate-keepers may be non-English speaking or choose English as a secondary language. Therefore, this study targets both the institutionally based

and non-institutionally-based gate-keepers, the English speaking and the non-English speaking, in the three ethnic groups, who have the most potential for increasing the flow and utility of information in their communities.

The eight objectives of the study are as follows:

(1) To ascertain the communication and networking behavior of the information gate-keepers;

(2) To identify how the information gate-keepers formulate and transfer information to end-users;

(3) To compare the information seeking behavior of the gate-keeper within each of the three ehtnic groups;

(4) To demonstrate and compare the role and importance of language in the information seeking behavior of Latinos, Asian Americans and American Indians;

(5) To classify the type of information that is transmitted;

(6) To demonstrate the role and importance of various information sources (including the public library) to the gate-keepers;

(7) To establish a mechanism for the exchange of information between librarians, and gate-keepers in their respective communities;

(8) To identify more effective Information and Referral delivery systems for utilization by information gate-keepers.

Implications for the education of information professionals

The focus traditionally has been on training individuals for employment as public librarians in culturally diverse communities. The Information Age combined with the stronger orientation of universities toward research has dictated that schools of library and information science can no longer emphasize training over education as previously done in the United States. The schools have to be more oriented toward basic and applied research and development and conveyance of theories and principles. The intent, now is to better educate students for the provision of services and programs for the future.

As a result, there are clear implications for the curriculum, recruitment and placement of students. Students intending to work with ethnolinguistic groups might be advised to master the following: the appropriate languages, management, organization of information, refer ence, information policy, information seeking behavior, and research methods emphasizing evaluation. Schools which are located in regions which are experiencing culturally diverse population growth, may offer a specific course designed to address the unique information needs of these groups. Complimentary to an effective curriculum are faculty and doctoral students engaged in meeting the aforementioned research agenda and in being sensitive to the appropriate cultures. This sensitivity should of course be reflected in the recruitment and retention of students and faculty.

Challenge for the future

As Merton states, "Work occupies the body and the mind and is necessary for the health of the spirit. .. Work brings peace to the soul that has a semblance of order and spiritual understanding."[32] He identifies the challenge which we must meet, if library and information services are to reach all of the intended population.

We need a research plan to bring a small degree of order and spirit to our efforts towards the prompt and effective delivery of information in a technological age, where national borders are breaking down and information is being more freely distributed.

End notes

1. Fisher, Edith Maureen. "Minority Librarianship Research: A State-of-the-Art Review." *Library and Information Science Research* 5 (Spring 1983):5-65.
2. Shockley, A. "A History of Public Library Service to Negroes in the South, 1900–1955." Delaware State College, Dover, D.E., 1960.
3. Ballard, R. "Job History of the Atlanta University School of Library Service Graduates, 1948–1959." Master's Thesis, Atlanta University, 1961.
4. St. George, Arthur and Robinson-Weber, Sandra. "The Mass Media, Political Attitudes and Behavior." *Communication Research: An International Quarterly* 10 (October 1983):487-508.
5. Chatman, Elfreda A. "Low Income and Leisure: Implications for Public Library Use." *Public Libraries* 24 (Spring 1985):34-36.
6. Thews, D. "Public Library Services to the Indians of the United States and Canada." Master's thesis, University of Minnesota, 1971.
7. Metoyer, Cheryl. "Community Information Needs and Library Potentials." Paper submitted to the White House Pre-Conference on Indian Library and Information Services on or Near Reservations (Denver, Colorado, October 19-22, 1978).
8. Heyser, Richard G. and Smith, Lotsee. "Public Library Service to Native Americans in Canada and the Continental United States." *Library Trends* 29 (Fall 1980):353–368.
9. Metoyer, Cheryl. "American Indian Library Services – State of the Art Report." Minneapolis: National Indian Education Association, 1976, (ED 161 573).
10. Ibid.
11. Townley, Charles. "American Indian Library Service." In: *Advances in Librarianship* (M. Harris, ed.), New York: Academic Press, 1978, 135–180.
12. Mathews, Virginia. "Report and Recommendations to the National Commission on Libraries and Information Science Relating to the Improvement of Opportunities for American Indians." Washington, D.C.: U.S. Department of Health, Education and Welfare, 1975.
13. McIsaac, Marina Stock, Quamahongnewa, Radford and Finneman, Ruth. "Native American School Library Professionals: An Unmet Need." *School Library Journal* 30 (January 1984):38–41.
14. Yeh, T. "The Treatment of the American Indian in the Library of Congres E-F Schedule." *Library Resources and Technical Services* 15 (no. 2), 1971, 122–128.
15. Antell, Will. "Identification of informational needs of the American Indian Community that can be met by library services." In: *Directory of Library Research and Demonstration Projects-1966-1975*. U.S. Department of Health, Education and Welfare, Office of Education: Washington, D.C. August 1978, 43-44.
16. Metoyer, Cheryl. "Improving Library Service to American Indian People". In: *Bowker Annual* (F. Simora and N. Glick, eds.), New York: R.R. Bowker, 1979, 54–56.
17. Chang, Henry C. and Har-Nicolescu, Suzine. "Needs Assessment Study of Library Information Service for Asian American Community Members in the United States" in *Report of the Task Force on Library and Information Services to Cultural Minorities*. Washington, D.C: NCLIS, 1983, 78-87.
18. Poor, W. "Importance of a Chinese Language Collection in the San Francisco Public Library Chinatown Branch." Master's thesis, California State University, San Jose, 1973.
19. Li, T. "A survey report of public library services to Asian Americans." *Journal of Library and Information Science* 3 (no. 2), 1977, 177-191.

20. Chiu, N. "Library services to the Chinese American community." *Journal of Library and Information Science* 5 (no. 1), 1979, 16-42.
21. Paul, H. "Library Service to the Spanish Speaking in the Public Libraries of the San Francisco Bay Area." Master's thesis, San Jose State University, 1976, (ED 124 158).
22. Padilla, R. "Providing Library Services to the Chicano Studies Program at the University of California, Berkeley. Policy Issues and Recommendations." University of California, Berkeley, CA, 1973, (ED 164 147).
23. Zink, L. "Evaluation of the Impact, Costs and Benefits of the Albuquerque Model Cities Library Materials and Cultural Centers Final Report." Volume I and II, 1973, University of New Mexico, Albuquerque, NM, (ED 072 829).
24. Gonzalez, Michael, Greeley, Bill and Whitney, Stephen. "Assessing the Library Needs of the Spanish Speaking." *Library Journal* 105 (April 1, 1980):786-788.
25. Garcia-Ayvens, Francisco and Chabran, Richard, eds. *Biblio-Politica: Chicano Perspectives on Library Service in the United States*. Berkeley: University of California, Chicano Studies Library Publications Unit, 1984.
26. Chabran, Richard. "Latino Reference Arrives." *American Libraries*, 18 (May 1987):384-388.
27. National Education Resources Institute. "A Systems Analysis of Southwestern Spanish Speaking Users and Nonusers of Library and Information Services Developing Criteria to Design an Optimal Model Concept. Final Report." Washington, D.C.: Bureau of Libraries and Educational Technology, 1972, (ED 066 173).
28. Haro, Robert P. and Cabello-Argandona, Roberto. System Analysis of Library and Information Services to the Spanish Speaking Community of the United States. Los Angeles: Bibliographic Research and Collection Development Unit, Chicano Studies Center, UCLA, 1978. (Pamphlet Series No. 3.)
29. Duran, Daniel and Monroe, Margaret. "Latino Communications Project: An Investigation of Communication Patterns and Organizational Activity Among Mexican, Cuban, and Puerto Rican residents of Chicago. Final Report." Washington, D.C.: Bureau of Libraries and Learning Resources, 1977, (ED 157 535).
30. Trejo, Arnulfo, and Lodwick, K. "Needed: Hispanic Librarians – a survey of library policies." *Wilson Library Bulletin* 53, 1978, 259–266.
31. Metoyer-Duran, Cheryl. *Information Gate-keepers in California's Ethnic Communities*. Funded by the California State Library, 1990–1991.
32. Merton, Thomas. *No Man Is An Island*. New York: Harcourt, Brace and Jovanovich, Inc., 1955.

Library Education in a Pluralistic Society

Shmuel Sever
Haifa University Library Studies,
Israel

Abstract
The pluralistic nature of many modern societies poses a challenge to the librarian and to accepted forms of library education. Pluralism is seen in many ways: educational levels, economic status, religious, linguistic and ethnic variety, etc., all of which may to some degree obligate differential forms of library services, in order to best meet patrons' needs.

To cope with the challenge of pluralism, the librarian needs to be familiar with concepts of social science and of communications. Unfortunately, this is not in evidence in the library school curriculum. Instead, such changes as are introduced focus on acquainting students with modern technologies that are becoming common in libraries: computers, information retrieval, and so forth.

In order that librarians should be *reader*-centered, rather than *technology*-centered, courses in comparative librarianship, the library in society and the history of library services should be introduced (or re-introduced) into the curriculum, alongside courses in interpersonal and mass communications, anthropology, human engineering and so forth.

The pluralism existing in most societies today presents special challenges to librarians throughout the world, and their ability to serve their public in spite of its heterogeneity will depend to a great extent on the kind of education we can offer aspiring librarians. Therefore we shall have to define what social pluralism implies from the point of view of library development and to discuss what are the implications of these social features for library education.

The most fundamental characteristic of social pluralism is the divergent and often contradictory features of society. While multiple ideologies, norms and values must co-exist within physical borders and affect the behavior of different population groups, the basic professional ethic of the librarians in the Western world has traditionally urged them to serve all groups of society in acquiring information, to make available to patrons of all persuasions and views all the information that does not conflict with the need for privacy of others. Students of librarianship are taught that in a democratic society it is the duty of the library to give information, preferably free of charge, to every reader. A public library, therefore, needs a librarian whose personal world outlook is liberal and unbiased, whose professional training has oriented him towards tolerance and acceptance of a variety of opinions and views, and whose belief in the democratic and free exchange of ideas is unshaken.

As opposed to the democratic public library, other types of libraries – special, academic and school libraries – are focused on the needs of a part of the total society and the professional ethic of everything to all does not apply. Special libraries often limit severely the number of people having access to their information, and in some cases even discriminate among people within the same organisation. Few academic libraries serve the general public of the area in which they are physically situated, restricting service to faculty, students and staff, but excluding most of others. The materials available in a school library are accessible only to the students and teachers of the school, and use of the collection or parts of it may not even be granted to all the age-groups attending a particular school.

It is therefore clear that the demands for information within a defence or industrial complex will be restricted to a selected few and the librarian may be charged with the responsibility of barring outsiders or eventual competitors from access to the library's information. When treating the problem of access to information within different types of libraries, we accept and even endorse the idea of differential service to special groups. Are educators of library science as prepared to endorse the idea of differentail service to social groups existing within a pluralistic society?

If we accept the assumption that different libraries give different services according to the different needs of user groups, we shall have to determine what are the needs for information among a variety of users, and apply our knowledge of these needs to the kind of library education we are giving our students.

Social pluralism can take a variety of forms, and the following list is in no way exhaustive even though all are entitled to special attention on the part of the practicing librarian:

Differences in educational and economic level may create social groups whose needs for library services can be widely different.

Differences in religious and traditional ethnic backgrounds require differential library services.

Politics and their surrounding ideology can be a highly divisive social force, demanding special adjustment of the library.

Societies expressing themselves in a multitude of different languages require a library solution in order to satisfy differential language needs.

Cultural and ethnic backgrounds have to be considered in the creation of library services, because services suitable to one group may not be acceptable, or congenial to another within the same national framework.

National or tribal affiliations will also require differential treatment if library services are to serve all members of the society.

Last but not least, current views and ideologies must also be taken into consideration, as their impact on the library and on the users can be central.

Some of the above mentioned items are obvious in most societies, but are not always identified as pluralism in the usual sense of the word, while all the above differences require differential approach to library services. For example, differences in economic power may not seem to be an attribute of a pluralistic society, but the demands made on the library are widely different: the well-to-do may require industrial and financial information which is of no use to the poorer strata, while information about civic rights, social security and job opportunities are more directly important for the poor than for the rich of the same community. Language and levels of literacy, religious and ideological variants, traiditons and national affiliations all require different types of services and of collection development. Language, being the major means of communication between people can become an important tool for cultural integration or assimilation, but can also guarantee that recorded cultural knowledge will be preserved in the library and when needed, propagated through it.

The plurality of languages within a society is worth special mentioning. While it is accepted that a language such as English be used supra-nationally to create understanding beyond language barriers and national frontiers, it is also important to remember that the imposition of the language of the majority on a minority group may become a divisive force as well as a unifying one.

One of the most exciting social phenomena is the cultural pluralism existing in many groups of human beings, in spite of a superficially common background, cultural differences which criss-cross society from within, can be observed as having an impact on ways by which different members of society develop rules of politeness and behavior that permit them to co-exist

within a certain social context. As cultural concepts are acquired in the course of socialisation by the individual, the differences emerging can be quite fundamental. Studies carried out on the social rules of children from different cultural and ethnic backgrounds in Israel showed for example, that the rules governing access to toys within a kindergarten class of middle-class or kibbutz children was prominently different from those evolved by Bedouin children and these again differed from those of a group of children from a mixed Muslim and Christian settlement.[1] If access to toys can already be different at kindergarten level, surely it is bound to affect attitudes later in life. If that is true, then library services should also reflect such cultural differences.

In Israel, where a number of cultural and religious sub-groups exist side by side, ideological considerations prevented secular libraries from carrying works of rabbinical literature on their shelves. This may partly explain why Jews from Arab countries, in North-Africa and in the Middle East failed to use and develop secular public libraries, in spite of a lengthy proto-library tradition which existed in their past lands of origin. Over a generation was to pass before Jews from Arab countries adapted to public library use and it is only during the eighties that the Arab population of Israel, both Moslem and Christian, has began to develop public libraries of a secular kind.[2] This trend, in turn, has depended to a large measure on the development of an Israeli-educated leadership, that is predominant in the network of local authorities and on a reader of an increasing academic and professional level.

Given such a cultural, economic and social diversity within a relatively small population, the librarians serving it must design the organisation of collections, services and human relations between patron and librarian accordingly. In today's terms the meaning of the concept "library" must go beyond the confines of written media such as books and periodicals, i.e. the provision of services traditionally considered to be the essence of librarianship and to encompass all the means of recording knowledge and recording information. Thus micro-forms, tape- and video recordings, films and on-line computer services must all be offered to the user so that the rights of choice, of browsing and of repeated reading may be fully available. Modern media, especially since the development of video-technology, offer people a variety of sources of information: TV, films, compact discs, etc., which are in essence similar to books. They may be "read and reread", browsed and watched whenever one wishes to, but it is important for the library to realise that if it ignores the existence of technological advances, the users will probably ignore the library.

What does all this imply for library education? First and foremost, the librarian must be made aware of the problems of pluralism which will affect library services. Once aware of the extent and types of differences among the people that the library is expected to serve, the librarian must be able to analyse the cultural, educational, economic and social diversity of the users. For example, a librarian serving a partly illiterate community must recognise that needs of those who can read only marginally must also be met, for they have equally urgent needs for information, entertainment and education. This is perforce different from serving the requirements of a literate, educated population. In order to fulfill its role, library education should be user-centered and not only technology-centered.

Minority groups in the religious or ethnic sense also require library services that may not be compatible with those planned for a "general public". Many aspects of the collection organised for a general public would be offensive to orthodox Jews and Moslems, while a collection organised solely according to the needs of a religious community would be overly restrictive and outside the interests of a larger readership. Even architectural considerations may not be "standard" in different communities: cultures which rigidly separate men and women in other spheres, would probably insist of separate libraries along sex-lines. Thus while full access to all shades of information may and should be preserved and accessible in

a large city-wide library *system*, the services given to a special community within the city or to a neighbourhood of a special nature would have to be tailored to fit the requirements of that particular type of patrons.

Computers are entering the lives of increasing numbers of people, and their use by libraries is gaining momentum. However, the mere availability of computer technology does not solve the problems of people lacking computer literacy. Rather, it may turn away from the highly technological library those members of society whose preferences lie with more traditional forms of information, such as books and periodicals, and who may embrace video-technologies while resisting computers and their uses.

In order to mitigate the effects of pluralism on society, the library student must be taught important social concepts such as "culture", "society" and "integration". A perusal of library school curricula tends to show, that basic social and cultural concepts are not given the same emphasis as library techniques such as cataloguing, classification, computer use and information retrieval. Even in the teaching of reference work, where the librarian is most closely in interaction with the user, social and cultural differences are too often not emphasised. The average graduate librarian may go through a complete study course without having had social science courses. New subjects such as information retrieval, statistics and research methods primarily deal with library material, not with library users. Management emphasises the administration of the library, but rarely deals with the adjustments necessary to serve out-of-the-ordinary patrons.

The curricula of library schools do not emphasise particularly courses dealing with interpersonal communication. It seems sometimes that aspects central to patterns of communications have been set aside in favor of courses dealing with technological programs and information retrieval.

Courses on the role of libraries in society, comparative librarianship and the history of library services in addition to basic notions of social sciences would prepare the library student to understand the patron, and not only the organisation of the collection. Moreover, an understanding of verbal and non-verbal communication within a society and among different social groups would pave the way to better service, as understanding the ideology of the user would enable the librarian to adapt his library to the needs of the community instead of attempting to fit the readership to the demands of a rigid library organisation. Incidentally, the study of verbal and non-verbal communication would make it easier for the practicing librarian to serve a variety of readerships in the course of a career, and would enable intelligent and professionally competent librarians to accept the demands of the users upon the resources and management of their community's library.

It seems logical in view of the above, that the aspiring librarians need to understand interpersonal communication and that the library school curriculum should either include courses in social science and in selected problems dealt with by sociologists and anthropologists or require a background in those areas as a prerequisite to admission. Any librarian serving a certain user-group, be it the users in a public library, or the students and faculty using academic and research libraries, must establish a rapport with the potential clientele. Understanding of verbal and non-verbal communication may help in establishing that rapport, and in overcoming the first difficulties in getting-to-know users. When the time comes for a particular library to assist those who will not easily become users, again the problem may be one of inadequate communication rather than lack of enthusiasm on the part of the librarian and the potential users. As communications are the basic instruments of the librarian, it seems ironic, and almost incredible that this discipline is not one of the requirements for a library degree.

The curricula of library schools are heavily slanted to teaching necessary library techniques, especially in computer science and information retrieval and dissemination. The people who are to benefit from this technology, the users, are less studied, and the result may be a gradual dissassociation between the user and the library. In spite of the additional burden of content social sciences and communications would place on the students and teachers of librarianship, knowing the user is as important and perhaps even more important than knowing all the ways of extracting information from the ubiquitous databases and information sources. If librarians were more in tune with their users they could contribute more to the development of new technologies which serve their public. Such a switch in priorities may require rethinking the problem of curricula and research in librarianship, but to this author it seems probable that unless the librarian knows the user and the nature of his needs all the technical skills of the librarian will be of little consequence to the community the librarian is supposed to serve.

[1] Sever, Irene, *Conflict resolution and social control among preschoolers, Jews, Arabs and Bedouins*. Haifa, Haifa University, 1980.

[2] Sever, Irene and Shmuel, *Library in Society* (in Hebrew). Jerusalem, Center for public libraries, 1990.

Each one an Individual: International Students in United States Library and Information Science Programs

Julie I. Tallman

Abstract

This article describes the results of a study of the levels of international students' satisfaction with United States library and information science programs, based on dissertation research completed in the spring of 1990. The purpose of the study was to determine the level of satisfaction and what schools could do to improve the education and environment of international students. The results suggest while most international library and information science students place a high value on their U.S. educational opportunities, they are concerned about faculty lack of knowledge and interest in the international information scene. Demographic background of the students, outside of geographic origin, had very little influence on their levels of satisfaction.

This paper presents some of the results of the first national survey of international doctoral and master's students attending United States library and information science programs. The research was initiated to determine the level of satisfaction the students had with their academic programs and what schools could do to improve the educational environment of international students. One of the important parts of the study was the attempt to find factors from the academic programs, specifically those variables most likely to create problems, or the international students' demographic backgrounds which could be used to predict the students' levels of satisfaction.

Because of their reported enrollment of international Ph.D. and D.L.S. students in the 1989 Association of Library and Information Science Education Statistical Report,[2] seventeen schools were asked to allow their students to participate. Names of international students were actually solicited from the fifteen programs who had actively registered international doctoral students for the fall of 1989. From the names received, all international doctoral students and an equal number of international master's students randomly selected were sent a questionnaire. They were asked to rate their levels of satisfaction with their academic program on a five point scale ranging from no satisfaction to high satisfaction. The survey had a 60% overall response from the 226 questionnaires mailed with 114 questionnaires or 53% of the total used in the analysis.

T-tests, regression techniques, and descriptive statistics were used to analyze the students' answers. The questions on the survey instrument were separated into four general sections which became group variables: information received by the student before arrival; factors relating directly to the academic program such as academic performance, scheduling, satisfaction with classes and faculty; relevancy of education factors including allowable research done on topics relating to the student's own country; and support programs provided by the school or university such as computer skills instruction and English language tutoring. Four additional group variables were analyzed. One group variable consisted of aspects of the student's program under the student's control such as comfort factors with professors and other students, paricipation in class and other activities, and English language facility. A second variable included responses about aspects of the student's program not under the student's control such as quantity and type of assignments, methods of grading, steps to take in solving academic conflicts, advising and faculty interest. A third group variable covered

discrimination defined as treatment by faculty and student peers. The fourth extra group variable included satisfaction concerning personal English language skills covering comprehension, writing, and speaking. The students were moderately satisfied or higher with all eight of the group variables. They rated nine out of 58 individual variables or factors (15%) at levels below moderately satisfied.

Specifically, international students felt their faculties had a low level of interest in international professional information topics. They were less than satisfied about the faculty's level of knowledge about these topics and the international students' home country information environments. According to the students' indication of levels of satisfaction, the faculty also did not have enough knowledge about international student problems and were not perceived as encouraging class discussion about international information and library science topcis. In other areas, the students were less than moderately satisfied with the information they received before arrival about funding opportunities and faculty. They expressed some discomfort in participating in student organizations and desired stronger writing and counseling support programs.

To isolate factors which might be related to the international students' level of satisfaction with aspects of their academic program, three research questions were developed. The first research question asked: "Do students from different regions of the world have significant differences in their perceptions of satisfaction with United States library and information science educational programs?" Because of the low number of students representing most countries, they were divided into the following regions:

MIDDLE EAST–NORTH AFRICA: Iran, Morocco, Algeria, Saudi Arabia, Israel, Lebanon

SUB-SAHARAN AFRICA: South Africa (the two participants are black South Africans), Tanzania, Nigeria, Cameroon, Ethiopia

LATIN AMERICA-CARIBBEAN: Brazil, Venezuela, Puerto Rico, Dominican Republic, Jamaica, Chile, Guyana

EUROPE-NORTH ATLANTIC: Canada, Belgium, France, United Kingdom, Poland

ASIA-PACIFIC: Australia, People's Republic of China, Republic of China, Hong Kong, Thailand, Indonesia, Philippines, Burma, Korea, India, Sri Lanka

Even though unlikely combinations resulted, such as the Australian student with Chinese students, grouping was necessary to permit analysis through the computer program Statistical Package for the Social Sciences/PC+.

Students from Sub-Saharan Africa, although few in number, seem to have had a problem with some important facets of their programs, particularly the quality of information received about the curriculum before admission, comfort with student behavior in class, ease in participating in student organizations, and faculty support of a thesis topic relevant to home needs. The Asia-Pacific students had trouble participating in student organizations. The Latin America-Caribbean students were not satisfied with the quality of advising they received. The Middle East-North Africa students did not feel accepted as full academic partners with U.S. students. All students except the Europe-North Atlantic students were dissatisfied with faculty expertise on their home information environment. While rating them at levels above moderate satisfaction, students from different regions also gave significantly different responses to other factors:

- satisfaction with methods of resolving academic conflict
- speaking ability in English

- comprehension of English
- amount of time in program for practicum

The second research question asked: "Are there variables within the areas of information, past educational experience, relevance of education and school support programs that could predict which international students might have lower levels of satisfaction in certain areas of their academic programs?" The object of this question was to find out if any specific factor had a measurable influence on change in satisfaction with the academic program.

Two individual factors dealing with information received before arrival were found to influence change in satisfaction with the academic program. An increase or decrease in the level of satisfaction with the amount of information received on academic requirements and the amount of information received on funding would explain a corresponding 13.5% change in satisfaction with the academic group variable. Regionally, the Europe-North Atlantic students seemed to feel they needed more pre-admission information on U.S. funding possibilites than they had received.

Four factors from the relevancy of education questions were found to explain a 56.5% corresponding change in the level of satisfaction the students had for the academic group variable. Listed in order of importance in influencing change were the factors indicating course content fitting needs, faculty with expertise in the student's interest areas, amount of time availabe in the student's program for a practicum, and faculty expertise on the student's home information environment.

Finally, two factors under the support group explain a 26% corresponding change in the level of satisfaction for the academic group variable. These two factors are sufficient orientation by the school and sufficient school support for international organizations. Although the students rate both factors slightly above moderately satisfied in this study, the students from Sub-Saharan Africa and Latin America-Caribbean regions seem to have some problems with the orientation offered by the schools. Both rate the orientation level well below moderately satisfied. The students from Middle East-North Africa and Latin America-Caribbean also rate school support for international student organizations below moderately satisfied. However, the differences in means among all the regions are not significant.

The third research question asked "Are there variables in demographic categories other than country of origin which can be used to predict international students' level of satisfaction toward their library and information science program?" From the remaining demographic variables, only two factors, having a job waiting upon return home and identifying with a U.S. ethnic minority, had significant relationships. Those who had a job waiting (35 out of 110 answering the question) felt more confident about their personal English language skills scoring them higher than the students who did not have a job waiting. Those who identified with a U.S. ethnic minority (76 out of 111 students answering the question) were more concerned about discriminatory treatment. Black international students responded to the discrimination question by indicating low satisfaction. Because the sample for this section was very small, judgement should be carefully reserved. However, schools should recognize that some Black international students have strong feelings about the treatment they have received particularly from student peers while Asians and Hispanics indicated above average satisfaction.

In addition, these students expressed a lower level of satisfaction for the school or university's support programs. Among all the regions, the Hispanic students gave the lowest level of satisfaction to the support group of questions indicating poor satisfaction with the programs offered by the schools and universities. The Blacks and Asians rated their levels of satisfaction with the programs at slightly above moderately satisfied.

The number of trips taken abroad before the current educational experience proved to be an important factor to use in explaining differences in levels of satisfaction for the academic program questions (27%) and relevance of education questions (37%). The number of trips abroad combined with the factor of time spent in the U.S. this degree program explained 39% of differences in level of satisfaction with academic components under the student's control. The trips taken abroad factor combined with the number of courses taken and looking for a change in job factors explained 54% of the differences in level of satisfaction with personal English language skills.

Perhaps the most interesting result of the study was the lack of demographic and academic factors having significant effect on the levels of satisfaction felt by the students. Most of the relationships which were found did not involve major program factors. It did not matter whether students were at the master's level or doctoral level, male or female, married or not married, young or more mature, had children at home or in the United States or not at all, came from different religious beliefs, or did not intend to return home. Student responses, with the exceptions noted above, had no provable relationships with factors in their backgrounds or academic programs.

Not all students were entirely happy about each of the variables considered in the study. The following factors had thirty percent or more of the international students responding indicating negative satisfaction levels:

- faculty expertise in home country information environ. (63%)
- faculty knowledge about international student problems (50%)
- faculty interest in international topics (49%)
- home country topics being part of class discussions (45%)
- programs providing writing support (43%)
- comfort in participating in student organizations (42%)
- quality of information received on funding (42%)
- programs providing counseling support (41%)
- quality of information received on faculty (41%)
- programs in typing and word processing (36%)
- comfort in class participation (35%)
- faculty with expertise in student's interests (34%)
- availability of materials in library related to home country (32%)
- quality of information received on housing (31%)
- sufficient school orientation (31%)
- programs providing tutoring in English (30%)
- U.S. students treating international students equally with U.S. students (30%)

The open-ended questions provided a place for students to respond to questions asking why they came to the United States to study, what their greatest adjustment problem was, what U.S. programs provided which national or regional programs could not, and what their school could do for them to help ease their adjustment.

The students praised the quality and opportunities available to them through a U.S. education. They were excited about the technology and facilities, which did not seem to be available at national or regional programs. In addition, many of them specified their national and regional programs did not yet have Ph.D. programs. Students mentioned high standards, good research opportunities, high degreeed of development, hands-on technology, and strong training availibility. Others were influenced by teachers and friends trained in the U.S. Some students reported they did not have a choice of schools.

Language is still the greatest adjustment problem in spite of its not having a significant relationship with other factors or problem areas. Many students simply declared "Language!" Forty-one students, a large minority, wrote about some type of speaking, comprehension and writing difficulty. On the scaled questions 23 students were less than moderately satisfied with their speaking abilities, 13 with their comprehension abilites, 23 with tutoring programs in English, and 38 with writing support programs. Because of the lack of significant relationships, the conclusion cannot be reached that language problems overwhelm all other problems. They do, however, still play a significant part in the academic success for many students.

Other problems mentioned were concern with the lack of coverage of the international information arena. One student commented that "one is expected to think like an American. Professors assume we know a great deal more about American culture than we actually do." Another complained that "the real information problems of developing nations" were ignored.

The most frequent answers to the question asking what U.S. programs provided that programs did not in the student's own country or region included access to computer technology facilities, books, resources, "cutting-edge information," and research expertise. One student said that, "the United States puts effort, without any hesitation, in establishing the sound education environment, and that is something other countries can't compete with." Many students used this section to comment again on the lack of Ph.D. programs in their own countries.

The last question asked what was the most important thing a U.S. program could do to help ease adjustment problems. Students particularly wanted faculty to be more sensitive to international information problems. They wanted strenghtened English language tutoring, more frequent access to advisors who care, stronger orientation programs with closer connections to international student services offices, more information about courses offered, more financial assistance, consistent and continuous support, more international discussion in the classrooms, more emphasis on international topics in the research collections, more interchange and fellowship with American students, flexibility in courses, and an ombudsman to help with academic and cultural problems.

Greatest concern was expressed about the faculty in U.S. programs and the lack of apparent faculty interest in the students' international backgrounds, environment, and international information concerns. These problems give international students the impression that the U.S. is still isolationist in its view of the world's information needs. Students often perceive themselves as isolated from the educational objectives of their U.S. programs. The present environment will not change in any substantial way until faculty can develop more actively an international consciousness.

1. This paper is based on dissertation research for the Ph.D. at the University of Pittsburgh School of Library and Information Science, April 1990. The citation is Julie I. Tallman, "Library and Information Science Programs in the United States: International Student Perceptions of Their Academic Adaptation Process," (Ph.D. diss., University of Pittsburgh, 1990).
2. ALISE, *Library and Information Science Statistical Report,* ed. Timothy W. Sineath (Sarasota, FL and State College, PA: Association for Library and Information Science Education, 1989), 105–107.

Instructing the User or Improving the System: Research and User Feedback for Interactive Library Catalogues

Micheline Hancock-Beaulieu
Centre for Interactive Systems Research,
Department of Information Science, City University,
London, England

Abstract

Online catalogues have provided users with new opportunities for access to library materials. In spite of the apparent success of the electronic medium, the user has encountered a number of problems in searching the catalogue. To overcome these difficulties the librarian has concentrated on giving instruction and assistance on system use. This may have been regarded as a substitute for system improvement. Research approaches in the development of more intelligent interfaces and retrieval methods indicate a need for more user feedback. Librarians are in a good position to provide some of that knowledge. It is suggested that the library practitioner has an active role to play in the design process and in bridging the gap between research and application.

Introduction

The online catalogue has had a great impact on raising users' expectations in finding information. At the same time automation has also raised fundamental issues with regard to the function and effectiveness of the bibliographic tool. In response to this apparent discrepancy between the users' enthusiasm about the new technology and the technology not meeting their requirements, two strategies have been followed.

The first is based on the assumption that the searcher doesn't have the necessary skills to use the tool effectively and can be trained. The second recognizes that the burden cannot be put entirely on the user and that some improvements can be made to the system. We shall examine the relative merits of both of these approaches. That is to say, how the librarian has attempted to instruct or assist the user and how the researcher/designer has sought ways of improving the system.

Need for user assistance

From the beginning librarians have been concerned about user acceptance of the online catalogue, and in particular about its suitability for inexperienced or naive users. That concern was well founded, bearing in mind the profession's experience with online services over the previous decade and the consequent rise of "intermediaries" as a new breed of professionals. It was readily recognized that although OPACs were apparently more "user-friendly" than online information retrieval systems, nevertheless users would need some form of assistance.

The problems encountered by users have been classed by Borgman as being "procedural" or "conceptual" (1). The former relate to the mechanics of using the equipment including the correct use of the keyboard, choosing appropriate commands and generally finding one's way around the system. The latter refer to difficulties arising from not understanding how the system operates behind the screen, i.e. the user's conceptual model of the system.

It may be useful for our purposes to further differentiate those conceptual problems into:

(a) retrieval difficulties, such as the use of Boolean operators, distinguishing between phrase searching and keyword searching, and other search mechanisms or indexing policy,

(b) vocabulary problems in matching the system's language, or vice versa the system matching the user's language. The language difficulty is not just concerned with simply matching but also includes the user's inability to express his information need. This encompasses the more fundamental issue of how subject matter is indicated or described as opposed to the mechanics of searching by subject.

Characteristics of assistance

Help, assistance, instruction and training are some of the terms which have been used to express the general concept of providing support for the user. Hildreth (2) defines four characteristics or "dimensions" of user assistance: aim, locus, mode and invocation.

The aim is to overcome the problems encountered by users as discussed above. Hence the purpose or objectives of user assistance could be one or more of the following:

1. to assist with the use of the equipment itself and clarify the dialogue with the system
2. to assist with the retrieval task and mechanisms for finding useful material
3. to assist the user in expressing his information need and in matching the system's language

The locus of the assistance refers to its source. Help could be provided online or offline, in a printed form, formally in a training session, or informally by a librarian or friend.

With regard to the mode of assistance, this means interactive help as opposed to non-interactive help. Interactive help implies an immediate, positive, direct, and responsive form of help which focuses on a specific need at a specific point in the search process. Non-interactive help by contrast is indirect and provides background support on a more advisory or preventative basis.

The fourth characteristic is the method of invocation or of activating help. Either the user or the system could take the initiative. If the system takes the initiative, this could be invisible or transparent to the user, that is to say that given certain conditions help could be activated automatically unknown to the user. Alternatively help could be semi-automatic, whereby the searcher is offered assistance and his consent or participation is required to implement it.

Online provision of assistance

Although assistance can be provided offline through printed guides, tutorials or more informally by library staff, our main interest here is in online assistance. We shall now consider to what extent user instruction or assistance in current operational online catalogues meet the criteria which have been suggested above. In addition to error messages or screen prompts, most commercial second generation OPACs now offer a separate help facility which can be configured by the individual library. Libraries may also have the flexibility to specify other elements such as screen displays. This does put a substantial responsibility on the librarian to make wise decisions on behalf of the user. As yet there is no consensus or standards covering for example the data elements required in different bibliographic displays or the fields which should be indexed.

Likewise there is no guidance on the design or content of help screens. A help facility can consist of a dozen or so screens or an extensive parallel system in itself. Melvyl at the University of California had over 100 help screens. The OPAC at the Royal Library in Denmark has a facility with more than 250 discrete screens. Such a facility would include a full range of procedural as well as explanatory instruction. However comprehensive, these should not be

regarded as a substitute for clear, on the screen messages and informative displays at the interface itself.

A fair proportion of online assistance focuses on the retrieval mechanisms. This may explain boolean operators, keyword searching or the way search statements can be formulated. In addition to the explanatory approach, suggestions can also be put to the user concerning for example alternative ways of searching when an initial strategy produces an unsatisfactory result.

Providing direct assistance to tackle the conceptual problem of matching the system's language is proving to be much more difficult. At present a help facility can only suggest in a general way that the searcher try different terms. The burden is then put on the users to think up those new search terms for themselves.

The biggest impediment however may not be in the quality of limitation of the help on offer, but in the fact that on the whole users have shown a great reluctance to seek assistance in the first place, whether online or offline. This may be due to the fact that they don't realize that they are having difficulties. It is also possible that having found that assistance was not relevant on a previous occasion, they then prefer to depend on their own resources. Another possibility is that by the time they do call up help it may be too late to have any effect. On the other hand it may be that learning by experimentation or trail and error is more effective. Whatever the reasons, there is a general indication that users, if they do resort to seeking help, prefer online, brief, interactive, point of need assistance as opposed to offline, extensive, general, formal instruction.

Surprisingly little research has been reported on the different methods or requirements for instructing users on the use of the online catalogue. One major project at Northwestern University produced inconclusive results (3). A group of students who received instruction in a one hour workshop performed marginaly better than a group who was given a brief printed guide. However a control group who received no instruction at all performed better than those who had read the guide!

What to teach, how and where has not been resolved. One of the researchers pointed out: "One of the most important functions of the user interface is to provide procedural training. In fact it is suggested that these techniques might be more easily acquired from instruction embedded in the system, once a conceptual model has been learned." This raises the question whether the users can be trained to develop a correct model of the system outside the system per se, or should the system enable a user to acquire a conceptual model through using the system itself, i.e. through interaction not only at the interface but within the search process.

Although online help facilities attempt to offer procedural, retrieval and conceptual assistance they appear to function more as an online version or implementation of the non-interactive offline methods and consequently suffer from the same limitations.

Improving the system

The alternative approach to dealing with the difficulties encountered by users is to tackle the problem from the system end. Recent developments at the interface have tended to concentrate on the repesentation and procedural levels. Graphic devices such as windows, pointers and form filling templates as well as colour have seemingly made OPACs easier to use or at least more attractive. However improvements on the retrieval and conceptual aspects have been explored only in a few experimental systems.

Retrieval aids

Retrieval based on the "best match" principle all too often results in failed searches or too many items retrieved. Current interfaces on online catalogues do not encourage users to

exploit available search options or facilities to limit or expand their searches. For example few users make use of Boolean operators, perhaps not surprisingly. They do not follow up keyword searches for related references through class numbers or subject headings.

New retrieval techniques are being developed in a prototype system called OKAPI as part of an extensive programme on OPAC research funded by the British Library Research and Development Department over the last five years (4, 5). These retrieval aids include some sophisticated automatic search sequencing mechanisms whereby Boolean operations can be carried out on different combinations of search terms. The system can thus retrieve not only records which contain all of the terms in a query (exact match) but also those which contain some of the terms (partial match). A term weighting algorithm then allows for records to be displayed in rank order with the best match first. To improve recall a second version OKAPI'86 introduced automatic stemming or truncation, cross-reference tables and spelling corrections. All of these operations are carried out behind the screen and invisible to the user.

A third version of the system is testing query expansion through relevance feedback. The user is invited to indicate which reference in a retrieved set is most useful. The system then automatically reformulates the query and seeks more references on the basis of the user's relevance judgements.

Some forms of these innovative features are starting to be introduced in commercial systems. For example Libertas has adopted OKAPI's combinational technique for partial matching. Other systems are explicitly offering the user the facility to link relevant items directly to other references with the same subject headings, class numbers or authors.

These retrieval aids are not only attempting to circumvent the drawbacks of Boolean searching but are also seeking to enlist the user's assistance so that the system can carry out a search in a more "intelligent" way.

Contextual aids

In addition to improving the matching mechanisms another way of assisting users is to provide "contextual" help, i.e. new suggestions or alternatives to their own vocabulary. The system could help translate the user's language into the system's language by placing the query in a subject context. The searcher would then have the opportunity to reformulate the query and position it in a broader/narrower/related subject field.

Two projects in progress are attemtping to introduce subject authority control online, so that preferred and related terms can be made available. The first will integrate LCSH assigned headings in bibliographic records with the LC subject authority file (6). For headings selected by the user, cross-references will be displayed to lead to more specific, broader or related headings.

A second study uses PRECIS as a basis for online thesaural control and browsing facility (7). User entered terms are matched with the PRECIS file which leads to preferred terms and cross-reference information.

The possibilities of using classification structure online has also been explored in a major study. The Dewey Decimal Classification Project (8) integrated classification schedules and the relative index to enrich the system's vocabulary and to relate user search terms to class numbers. From the latter subject perspectives or contexts could be displayed revealing the hierarchical structure of the classification from which the user could broaden or narrow a search.

These contextual aids could be particularly useful to users who have a conceptual problem in expressing their information need.

Future directions

The move towards more intelligent interfaces and retrieval methods and the need to provide more interactive, integrated, real time user assistance clearly can no longer be easily demarcated. Although user instruction has been the responsibility of the practitioner and the researcher/designer has been responsible for system development, a closer partnership is desirable and indeed inevitable.

To meet the common objective of assisting the user, collaboration could be initiated in two ways. Firstly new features in prototype experimental systems need to be rigorously tested in operational settings with real users having real information needs. Secondly the evaluation of existing operational systems including help facilities designed by librarians should be undertaken on a wider scale to obtain more and reliable user feedback for future system design specifications.

Current research at the Centre for Interactive Systems Research at City University in London, includes the evaluation of the OKAPI prototype as an operational system in the university library. Another project is concerned with the development of software which could be used by practitioners as a diagnostic or monitoring tool to collect data on user behaviour at the catalogue (9). The programme consists of a screen logging facility as a front end which can be combined with an online questionnaire.

Ultimately the best way to assist the user is to improve the system. The library practitioner could have an active role to play in the design of online catalogues. Perhaps more importantly the library profession must set the standards on the basis of user needs and requirements, and then ensure that system developers and vendors meet those standards.

References

1. Borgman, C. Why are online catalogs hard to use? Lessons learned from information retrieval studies. *Journal of the American Society for Information Science*, 37, 1986, 387–400.
2. Hildreth, C. Online user assistance for information retrieval systems. *Library Hi Tech*, 29, 1990, 74–77.
3. Baker, B. A conceptual framework for teaching online catalog use. *Journal of Academic Librarianship*, 12, 1986, 90–96.
4. Walker, S. and Jones, R.M. *Improving subject retrieval in online catalogues. 1. Stemming automatic spelling correction and cross-reference tables*. London: British Library, 1987. (British Library Research Paper 24).
5. Walker, S. and De Vere, R. *Improving subject retrieval in online catalogues. 2. Relevance feedback and query expansion*. London: British Library, 1990. (British Library Research Paper 72).
6. Markey, K. Integrating the machine-readable LCSH into online catalogs. *Information Technology and Libraries*, 7, 1988, 299–312.
7. Congreve, J. Problems of subject access: automatic generation of printed indexes and online thesaural control. *Program*, 20, 1986, 204–210.
8. Markey, K. and Demeyer, A. *Dewey Decimal Classification Online Project: evaluation of a library schedule and index integrated onto the subject searching capabilities of an online catalog*. Final report to the Council on Library Resources. Dublin OH: OCLC, 1986. (OCLC Report no. OCLC/OPR/RR-86/1).
9. Hancock-Beaulieu, M., Robertson, S. and Neilson, C. *Evaluation of online catalogues: an assessment of methods*. London: British Library, 1990. (British Library Research Paper 78).

La investigación Bibliotecológica en México: por qué, y para qué

Estela Morales
Directora, Centro Universitario de Investigaciones, Bibliotecológicas, Universidad Nacional Autónoma de México, México, D.F.

Resumen

La investigación en Bibliotecológía es una necesidad y una obligación en cada país.

Muchos esfuerzos en diferentes programas bibliotecarios se pierden porque los bibliotecarios desconocen la situación real, causas y efectos de un problema específico.

Muchas veces nos hemos cuestionado, primero el por qué y para qué de la investigación en bibliotecología y luego el por qué y para qué de hacerlo en México.

La investigación bibliotecológica puede responder a dos situaciones: la necesidad urgente de resolver un problema que afecta a cierta comunidad, o la necesidad de dar solución a inquietudes propias de la investigación, para conocer causas y efectos del fenómeno, o el origen y desarrollo de una conducta, de un usuario, de una organización, de la información en sí.

En Bibliotecología como en muchas áreas podemos hablar de investigación teórica y aplicada, y este proceso y su sistematización y ha empezado a dar con una dedicación de tiempo completo, que representa un reto para México.

El extraordinario desarrollo de la información impresa en el siglo pasado y principios del presente, ha sido superado grandemente por los descubrimientos científicos y avances técnicos y han propiciado otras posibilidades para obtener y ofrecer información, ya sea por la variedad de los medios en los que se representa esta información, como las instituciones y organismos que tienen como elemento de trabajo la información y las disciplinas que inciden en su estudio.

Si bien esta realidad debe tomarse en cuenta por los investigadores y los estudiosos de la información y la bibliotecología, también es importante tener presente que el motor que impulsa la recuperación y uso del conocimiento, no importando la gran variedad de usos y usuarios ha sido y es aún en nuestros días la Biblioteca.

Bajo el término común de biblioteca se engloba el uso de las nuevas – tecnologías, métodos y técnicas, aunque la etimología de la palabra ya resulte desactualizada, sin embargo, mientras el objetivo de satisfacer las necesidades de información de los usuarios, esté vigente y se logre de óptima manera, de esa misma forma estará vigente la Biblioteca.

La Biblioteca representa el ámbito democrático que nos permite ejercer uno de los derechos fundamentales del hombre: el saber lo que todos – los demás expresan, más allá de la espesa problemática derivada de la dependencia y monopolios económicos, políticos y culturales que ejercen su predominio en cada época.

La tecnología nos borra fronteras, nos acerca países, nos pone al alcance de la mano toda la información requerida, la de uso público y privado; pero los intereses políticos comerciales y de Estado y las limitaciones económicas entre otros aspectos en realidad producen el efecto contrario, he ahí el gran reto de las Bibliotecas de hoy.

La Bibliotecología es la disciplina que estudia el uso de la información, su organizasión, el comportamiento de la información y de los – usuarios de ésta y todos los aspectos que inciden

en esta problematica, además del o los organismos que realicen estas actividades u otras que conlleven al uso de la información y la satisfacción de estas necesidades.

Habitualmente a la Bibliotecología la agrupamos con las disciplinas consideradas en el área de las ciencias sociales, en nuestros días estas disciplinas son afectadas y modificadas por otras disciplinas que les permiten cuantificar, y evaluar con modelos matemáticos los hechos bibliotecarios, así como adecuarse al manejo rápido y exacto de grandes volúmenes de información, esto es un reflejo de lo que sucede actualmente en el área de las ciencias sociales donde es muy común el uso de las matemáticas, las estadísticas y la computación.

Estoy segura que muchas veces nos hemos cuestionado, primero el por qué y para qué investigar dentro de la bibliotecología y después por qué y para qué hacerlo en México.

En la Bibliotecología podemos dedicarnos al estudio de aspectos teóricos que a largo plazo permitan, en un momento dado, modificar los enfoques y los propios postulados vigentes, generalmente, por la ley de la tradición.

La investigación bibliotecológica puede responder a dos situaciones: a la urgencia de darle respuesta a un problema que afecta a una comunidad determinada, o a problemas que se plantea el propio investigador con el fin de profundizar sobre causas y consecuencias de un hecho, o de buscar el origen y comportamiento de una teoría sobre el usuario, la información, la organización, etcétera. Por lo que, en la Bibliotecología como en otras áreas se puede hablar de investigación básica y – aplicada.

La investigación básica incluye estudios que nos llevan al análisis – exhaustivo y al entendimiento profundo de un fenómeno, al llevar a cabo esta investigación no tenemos que preocuparnos por si el descubrimiento será aplicado o no. El estudio se emprende para adquirir un conocimiento que se enriquezca a sí mismo.

La investigación básica, llamada también pura o teórica, fundamentalmente se deriva de problemas intelectuales que frecuentemente por su originalidad generan nuevos conocimientos.

La investigación aplicada es pragmática, sus propósitos son más específicos y predeterminados al inicio, por lo general con el fin de resolver problemas prácticos o de descubrir un nuevo conocimiento que pueda ser utilizado inmediatamente.

Los resultados de una investigación básica pueden ser aplicados en la solución de problemas prácticos o ser utilizados como antecedentes de otros estudios. Estos resultados se incorporan al cuerpo general del conocimiento, algunas veces la diferencia entre investigación básica y aplicada no es fácil, especialmente en áreas jóvenes que están en proceso de construir una teoría, como es la Bibliotecología.

Cada día se hace más urgente la necesidad de conocer el por qué y el cómo del acontecer bibliotecario en nuestro país. El progreso y el impulso de muchas áreas de la bibliotecología se han visto limitados por la falta de una investigación adecuada y eficiente que nos ofrezca los elementos necesarios para fundamentar la creación o el cambio.

La Bibliotecología debe explorar nuevos enfoques y métodos que sean – aplicables a los diferentes aspectos de esta disciplina; estos nuevos enfoques requerirán de imaginación y originalidad basados en preceptos firmes y comprobados que se analizarán objetiva y cuidadosamente.

El momento que vivimos se caracteriza por rápidos cambios tecnológicos que nos llevan a nuevas soluciones de viejos problemas, al aplicar métodos científicos que enriquezcan el conocimiento bibliotecológico, a través de la experimentación, la encuesta, la investigación histórica, la investigación de operaciones y la aplicación de métodos cuantitativos.

El campo de estudio es muy amplio si queremos investigar aspectos teóricos y problemas prácticos propios de las bibliotecas y centros de información, como son adquisición, catalogación, almacenamiento y diseminación de la información; así mismo del cómo, del para qué y

para quién se genera la información, su comportamiento y medios de comunicación.

Ante esta situación la Universidad Nacional Autónoma de México consideró necesario que la bibliotecología contara con un espacio y personalidad propios dentro de un programa de investigación, con esta finalidad el 14 de diciembre de 1981 se creó el Centro Universitario de Investigaciones Bibliotecológicas.

Con la creación de este Centro se inicia el proceso de sistematización de la investigación bibliotecológica y se conforma un ente crítico que se dedica a las actividades de investigación de tiempo completo.

El Centro se preocupó desde sus inicios por ver a la Bibliotecología en su concepción más amplia, más allá de los estantes, más allá del recinto de la Biblioteca, verla como una disciplina que tiene como finalidad el conocimiento de la información, de los materiales en que se – representa, de los servicios que propicien su uso, de la tecnología y – metodología para hacerla accesible, del usuario destinatario de esta información y por supuesto de la biblioteca o recinto en el cual se – puede hacer uso de ella.

El objetivo principal es realizar investigación bibliotecologica que ayude a la solución de problemas nacionales relacionados directamente con las bibliotecas y centros de información del país y proporcionar apoyo indirecto a la educación, la investigación, la producción, la administración y la difusión de la cultura.

Entre sus funciones el Centro tiene, además de investigar, la de apoyar programas de formación de personal académico y de investigación de alto nivel, difundir el conocimiento bibliotecológio y, asesorar y propiciar programas de investigación con instituciones nacionales y extranjeras, así como apoyar desde el punto de vista metodológico programas bibliotecológicos útiles y prioritarios para la UNAM y para la república.

Las áreas de investigación que cubre el CUIB son:

a) *Filosofía bibliotecológica.* Las investigaciones en esta área están dirigidas a la conformación de fundamentos científicos y teóricos de la bibliotecología.

b) *Educación en bibliotecología.* En esta área se abordan problemas – teóricos y los derivados del proceso enseñanza-aprendizaje de la bibliotecología con especial énfasis en las experiencias nacionales.

c) *Historia de la bibliotecología.* Su ámbito de estudio está dirigido a rescatar y sistematizar los hechos históricos que han influido en la conformación de la bibliotecología como una rama del conocimiento.

d) *Desarrollo de colecciones.* En esta área se abordan los problemas relacionados con la conformación de los acervos. Su ámbito de estudio incluye, entre los aspectos más importantes, la selección, descarte, uso y evaluación del costo beneficio de los acervos documentales.

e) *Análisis y sistematización de la información documental.* Las investigaciones en esta área están relacionadas con el estudio de los sistemas lógico-matemáticos utilizados para la organización de información documental, y están dirigidas al análisis de los factores cualitativos que influyen en la interpretación y transcripción de la información a códigos convencionales como: catálogos, tesauros, sistemas de clasificación, vocabularios controlados y bases de datos. Abarca diversos aspectos que tienen un denominador común: comprender los fenómenos que se presentan en torno al almacenamiento y recuperación de información documental, como es el estudio de:

Catalogación, orientada a estudiar los sistemas para la descripción documental y a explicar sus finalidades.

Classificación y lenguajes documentales, se ocupa del estudio de la descripción de contenidos temáticos; vinculado al desarrollo de conceptos teóricos y sistemas lógicos, que permitan comprender y manejar los elementos cualitativos y semánticos que influyen en la interpretación y descripción del contenido de un documento, para representarlo por medio de resúmenes o categorías temáticas.

Normatividad, estudia el objeto y la función de las normas para la organización de documentos, bibliotecas y sistemas de información.

f) *Tecnología y sistemas automatizados*. Su ámbito de estudio es la automatización junto con las telecomunicaciones y la tecnología que se genera, que puede ser aplicable a las actividades bibliotecológicas y de información a fin de favorecer modificaciones, innovaciones y nuevas possibilidades. Este aspecto se estudia, también, desde un enfoque social en cuanto a los niveles de impacto y transformación, así como la relación con el uso de la información.

g) *Industria editorial*. Se investiga sobre los problemas de las publicaciones desde su generación hasta su distribución, a fin de buscar explicaciones que permitan comprender y conformar alternativas para un aprovechamiento óptimo de esta fuente de información. Esta área se inició con el estudio de las publicaciones oficiales.

h) *Legislación bibliotecaria*. Estudia la normatividad jurídica que rige a las bibliotecas, sistemas bibliotecarios, al flujo y uso de la información y a la tecnología de apoyo en sus ámbitos local, nacional e internacional.

i) *Hábitos de lectura*. Aborda los problemas de lectura de la población mexicana y se busca la formulación de alternativas que influyen en los hábitos de lectura.

j) *Usuarios*. En esta área se abordan estudios dirigidos a conocer y explicar las características, necesidades y comportamientos de diversos tipos de usuario, en relación con el uso de información y servicios bibliotecarios. El objetivo de esta área es lograr conocimientos para adecuar los servicios bibliotecarios y de información a la realidad del usuario mexicano.

k) *Organización y función bibliotecaria*. Su campo de acción es el estudio de los problemas concernientes a la estructura, funcionamiento y variables que afectan el desarrollo de las bibliotecas; también se estudia su papel en la sociedad, con el propósito de comprender y buscar explicaciones y alternativas propias a la realidad nacional. Actualmente se estudian bibliotecas universitarias y bibliotecas públicas.

Todas estas áreas están a cargo de investigadores especialistas en cada una de ellas.

En la medida en que se conforma la plantilla de personal, se impulsan y desarrollan las áreas de investigación que previamente se han detectado como prioritarias.

Hasta la fecha contamos con 15 investigadores de tiempo completo que a su vez reciben apoyo externo de especialistas en otras disciplinas cuando la relación interdisciplinaria lo demanda; y personal de apoyo en – biblioteca, automatización, trabajo editorial y logística docente y de difusión.

En el aspecto de personal es conveniente destacar dos aspectos: el reclutamiento y el entrenamiento.

Si bien es conocido por todos que México es un país con pocos bibliotecarios, en proporción a las necesidades y la demanda real y potencial, es también común enfrentar la realidad de que hay muy pocos bibliotecarios con experiencia y trayectoria en la investigación bibliotecológica. En general, el bibliotecario profesional se ve asediado por ofertas de trabajo relacionadas con el servicio y agobiado por las demandas de sus usuarios, los bibliotecarios que se dedican a la investigación lo hacen generalmente por satisfacción personal, no como modus vivendi. Con la creación del CUIB, nace la posibilidad de contar con investigadores de tiempo completo que se integran a un proceso creativo e innovador. En este momento forman parte del personal de la UNAM, quienes no son necesariamente experimentados investigadores, por lo que además de detectar a los profesionistas interesados y calificados en la investigación, se tuvo que emprender la tarea de apoyar a los ya formados y propiciar la formación de cuadros nuevos, para lo cual se cuenta con un programa permanente de superación académico que incluye cursos de metología de la investigación y otras especialidades de apoyo como estadística, automatización y tecnología educativa entre otras.

Tanto para apoyar las investigaciones en proceso, como la actualización y formación de investigadores contamos con una biblioteca que está desarrollando una colección de monografías, publicaciones periódicas, teses, folletos, recortes de periódico y un archivo de la palabra en bibliotecología. La colección cubre principalmente bibliotecología, archivología, informática, computación, administración y educación.

También vale la pena destacar la formación de una colección bibliotecológica latinoamericana y el inicio del análisis de la información contenida en estos materiales, así como, la formación del banco de datos correspondientes.

Esta colección y la de instituciones afines está al servicio de nuestros investigadores a través del trabajo desarrollado por tres bibliotecarios profesionales.

Para apoyar la actividad de la biblioteca y las investigaciones que se realizan en el Centro se cuenta con un Departamento de Computación.

Las investigaciones han generado productos desde los primeros meses de operación ya que, cada investigador realiza mesas redondas sobre el tema en que trabaja con el fin de propiciar el diálogo entre especialistas del área, y en algunas ocasiones pueden difundirse los resultados a través de publicaciones sencillas como son los Cuadernos de tópicos específicos. También cada investigador organiza un curso de actualización sobre el tema investigado con el fin de difundir, entre los bibliotecarios interesados, los hallazgos obtenidos en el proceso de la investigación realizada.

Además cuando la investigación se concluye y los resultados lo ameritan se tiene la posibilidad de publicarla; en relación con esta actividad editorial, cada investigador produce dos artículos al año.

Tanto las mesas redondas, como los cursos y las publicaciones forman – parte de las actividades de difusión del concimiento bibliotecológico universal y mexicano.

El Centro tiene relaciones de asesoría y colaboración tanto con dependencias de la UNAM como con otros organismos nacionales y extranjeros.

Un lugar especial en estas relaciones lo tienen las escuelas de bibliotecología del país, ya que uno de los programas del Centro es vincular la investigación con la docencia y apoyar a las escuelas tanto en la docencia propiamente, como con los productos de la investigación que en muchos casos son material de lectura para los estudiantes.

Algunas de nuestras investigaciones todavía en proceso ya han despertado la atención del sector público somo son el Censo de Bibliotecas Universitarias cuyos resultados la Subsecretaría de Enseñanza Superior de la S.E.P. ha utilizado. La de Bibliotecas Públicas que complementará los estudios que realiza la propia S.E.P., y el Estudio sobre la Clasificación de la Biblioteca Nacional de Medicina que ha despertado tanto el interés de la Secretaría de Salud

como el de la propia Biblioteca Nacional de Medicina que nos otorgó el permiso para la traducción de las tablas, mismas que formarán parte de este estudio.

El trabajo del CUIB se ha conocido en otros países y con ellos interacciona para fomentar y desarrollar investigación bibliotecológica, como ejemplo podemos citar: Perú, Colombia, Venezuela, República Dominicana, Cuba, Guatemala, Costa Rica, etc.

Este interés regional ha propiciado la colaboración y el apoyo de la Organización de Estados Americanos mediante el cual se pudo establecer a partir de 1984 un programa latinoamericano de formación de investigadores en bibliotecología; y del Gobierno de Francia para la formación de especialistas en información bibliográfica automatizada; también hay programas con el Consejo Británico y USIS, U.S. Information Service.

El CUIB se ha preocupado por: formar sus cuadros académicos, crear una infraestructura metodológica y técnica que origine un desarrollo propio de la bibliotecología en México, que mejore los servicios bibliotecarios del país, que a su vez satisfaga las necesidades de información del mexicano, sin descuidar el compromiso que nuestro país tiene con latinoamérica y apoyo a los países de la región en la planificación y diseño de programas de investigación bibliotecológica locales.

El espectro bibliotecológico es muy amplio, el CUIB empieza a descubrirlo, a conocerlo, a disfrutarlo, empezamos a tener los primeros frutos, ya estamos aportando soluciones en algunas áreas, pero apenas es el comienzo, tenemos mucho que hacer todavía, el futuro nos demanda todo nuestro trabajo y entusiasmo, no nada más a los bibliotecarios que somos parte importante del CUIB, sino a todos los que participan y viven de esta profesión.

Bibliografía

Busha, Charles H. *A Library Science Research Reader and Bibliographic Guide*. Libraries Unlimited. 1981.

Busha, Charles H. *Research Methods in Librarianship: techniques and Interpretation*. Academic Press. 1980. 417 p.

Estrada, Luis y otros. *La divulgación de la ciencia*. México, UNAM, 1981. (Cuadernos de Extensión Universitaria) 86 p.

Goldhor, Herbert. *Introducción a la investigación científica en bibliotecología*. México, UNAM, 1981. 177 p.

UNAM-Centro Universitario de Investigaciones Bibliotecológicas. *Informe de actividades 1982*. Comp. E. Morales. México, UNAM-CUIB., 1983. 64 p.

UNAM-Centro Universitario de Investigaciones Bibliotecológicas. *Informe de actividades 1983*. Comp. E Morales. México, UNAM-CUIB., 1984. 101 p.

UNAM-Centro Universitario de Investigaciones Bibliotecológicas. *Informe de actividades 1984*. Comp. E. Morales, E. Ramirez, Z. Solís. México, UNAM-CUIB, 1985. 49 p.

Scholars seek Information
Information-Seeking Behaviour and Information Needs of Humanities Scholars

Harriet Lönnqvist, Assistant Professor,
Åbo Akademi University, Department of Library and Information Science, Turku, Finland

Abstract

A study sponsored by NORDINFO, the Nordic Council for Scientific Information and Research Libraries, is reported. The object of the explorative investigation was to study the information-seeking behaviour and information needs of scholars in the humanities from a holistic perspective.

The method of focused interviewing was adopted for the collection of data due to the few research results available in this subject area. 64 people randomly selected according to specific criteria from the five Nordic countries, i.e. Denmark, Finland, Iceland, Norway and Sweden, were interviewed.

The results of the investigation show that the scholars in the humanities do not have a homogeneous information-seeking behaviour or homogeneous information needs. Variations from discipline to discipline can be seen; especially scholars doing research in linguistics or languages behaved differently in the humanities.

Compared to other information channels the research libraries, as expected, turned out to be of greatest importance for scholars seeking information and printed materials for their research. But they also bought literature privately rather extensively. Differences in the dependence on library collections could be seen. It varied according to discipline, mature or immature scholar, or the local library infrastructure. In this study, in general, the differences in information-seeking behaviour turned out to be most marked between mature and immature scholars. The use of book collections depended on the physical distance between the user and the collections. Of all categories of research libraries, the department libraries were the most important, but special libraries were also appreciated.

The study showed that what subject search for a scholar means, in most cases, is looking up individual names of persons, e.g. author of a book or journal article, or searching for information about a person, e.g. an artist or philosopher. The scholars used bibliographies to a rather small extent, i.e. their bibliographical awareness was rather low.

---

1. Introduction

In the late 1970's and 1980's there was a great interest in the information gathering and information-seeking behaviour of humanities scholars. It can be said that the interest in this field of research actually started in 1966 with the investigation of the information needs of historians that the *American Historical Association* had conducted (PERMAN 1968). In England the *Centre for Research On User Studies* started the *Humanities Information Research Programme,* which produced five reports *(CORKILL 1977; CORKILL 1978; CORKILL 1981; STONE 1983; STONE 1985).* A number of citation studies in different humanities disciplines have also been done *(VAUGHAN 1959; JONES 1972; HEINZKILL 1980; STIEG 1981; STERN 1983; CULLARS 1985; BUDD 1986; BROADUS 1987).*

In 1985 NORDINFO, the Nordic Council for Scientific Information and Research Libraries, initiated an investigation into the information-seeking behaviour and information needs of scholars in the humanities in the Nordic countries. A report was published in 1988 (LÖNNQVIST 1988). This paper deals mainly with this study.

2. The object of the study

The object of this explorative study was to cast light on the methods used by scholars for gathering information and their information needs. The intention was to find out how the scholars seek information and to what extent they use existing library and information services as well as their need for new services.

3. The selection of disciplines to be represented in the study

The humanities is a very wide field, and one whose scope has been much discussed. For this study a pragmatic definition was adopted. The selection was made among those disciplines represented at the Nordic universities, and more specifically at 15 major universities. Characteristic of all these is that a great number of humanities disciplines are represented at their faculties of arts.

In this study the following disciplines have been considered major humanities disciplines, here enumerated in alphabetical order: Archaeology, Ethnology and Folklore, Philosophy, History, Art History, Literature, Music, Science of Religion and Languages / Linguistics.

4. Methodology

The method of *focused interviewing* was adopted for the collection of data due to the few results available in this subject area. 64 people randomly selected according to specific criteria, from the five Nordic countries, i.e. Denmark, Finland, Iceland, Norway and Sweden, were interviewed. The interviewed subjects were divided into four categories: *1) mature scholars, 2) young academic lecturers/scholars, 3) mature students, and 4) users of information services in the humanities who were not working in universities or colleges, i.e. researchers working in archives, museums etc., civil servants, amateur researchers, newspaper journalisis, translators etc.* The division of the interviewed persons into these categories was based on an assumption that the differences in information-seeking behaviour and information needs would lie between these groups.

The method of qualitative subject analysis was used to analyze the interview data. The emphasis was laid upon trends an patterns in the material.

5. Mature and immature scholars

The analysis of the interview data showed that it was necessary to introduce one more categorization. Some of the scholars in category 2, young academic lecturers/scholars, were young in years but at the same time mature in experience, i.e. their scholarly production was large and they had fairly well developed informal network. Also, to be able to explain the results, it was necessary to introduce the categories *mature* and *immature* scholars. The differences in information-seeking behaviour turned out to be most marked between these two groups.

The criterion of a mature scholar is that he or she has a *large scholarly production*. In addition the person may have a well developed informal network. The scholarly production was considered large if it consisted of *at least two monographs and 10 journal articles/conference papers*. If this criterion was not met, the scholar was considered immature.

6. The role of the institutions in informationgathering by scholars

In the study as a whole emphasis laid upon the role of the research libraries in the information gathering of the scholars. The archives and the museums could not, however, be totally neg-

lected because they are very important to some groups of scholars. Those researchers who used archival material, for example historians, ethnologists, folklorists and some literature researchers, considered the archives more difficult to use and more important than the research libraries. For research literature there are alternative acquisition channels but not for archival material.

Several scholars who used archival material wanted more efficient retrieval systems. They were not satisfied with the level of service in the archives, which were considered to be bureaucratic, slow and inflexible.

Museum collections were used by those interviewed subjects who represented disciplines within which artefacts are important research material, e.g. archaeologists and ethnologists. It was of great importance to these researchers to be able to penetrate the collections of museums and to visit exhibitions. In particular the exhibition catalogues seemed to cause great problems to the scholars. One of the most important ways to announce archaeological excavation results is to do it through exhibitions of rather short duration. The catalogues of the artefacts in these exhibitions are scholarly valuable but are published in small editions. It is therefore difficult to get hold of them if you are in Scandinavia and do not have the opportunity to visit the exhibitions. In getting this material colleagues in Italy were of great help, but also some special libraries, like the Swedish and German Rome Institutes, which follow and acquire this kind of material, are truly difficult to find.

The interviews showed that the public research libraries played the greatest role in the information gathering of the scholars compared to other information channels. But they also bought literature privately to a rather significant extent. The most central literature in their own research field they bought privately to be able to always have it close at hand. Most of them subscribed to the most important journals. The language and linguistics scholars were, however, not as dependent on libraries as the scholars in other humanities disciplines. For them other information channels also played a significant role.

Variations in library dependence could be seen; these depended on what discipline the scholar represented, the scholar's status as mature or immature scholar, and the local library infrastructure. Here the local library infrastructure means the pattern of different types of research libraries on the local level and the physical distance between these libraries.

The physical distance to collections turned out to be of great importance to the use of them by the researchers in their information gathering. The results of the investigation clearly showed that the scholar in general first seeks information in his immediate environment, beginning with his own private library, if he has one. Then he consults the department library, the special library (which can be abroad), the local multidisciplinary research library, other multidisciplinary research libraries in the country, and last, multidisciplinary research libraries abroad.

Department libraries turned out to be of special importance to the scholars' information gathering. Their collections are built up systematically by the researchers themselves and thus have a profile adjusted to the group of researchers and teachers using the library. It can therefore be said that they actively influence the information the library offers. According to the interview answers department libraries seem to form the basis for the information gathering of scholars, i.e. those who are assigned to universities and colleges where de facto most humanities research is done.

Special libraries were also very much appreciated by the interviewed subjects, especially if the libraries have set their ambition on having almost complete collections in their field. University libraries and other large research libraries were mostly used for document supply from other libraries and for reading journals.

Other information channels than the institutional, in particular the informal network, were

important in research fields where there was a need to obtain information fast. If the research topic was very internationally oriented, the importance of an informal network increased, especially abroad. In general the interviewed subjects considered the institutions to lack prospects for fast information supply and transmission.

7. Information-seeking

One of the key questions in the investigation was subject search, i.e. how the researcher seeks information about a specific topic. Most of the interviewed subjects did not understand the term "subject search" and the question "How do you use the library to seek information about a specific topic?" These questions seemed irrelevant to them. The term and the question had to be explained.

Common answers were that they had not needed to start from zero. In most cases they knew the name of an author or another person and sought literature written by or about this person. From the text they got references to research material in which a specific thought or a problem was developed. Once these items were available, new references were received:

> "(...) it becomes a chain of references extending in all directions".

To have just a topic to seek information about was an unfamiliar initial state for most of the interviewed subjects. A mature scholar said that he

> "(...) is not at all interested in everything that has been written about a subject but just what is relevant to me at that particular time. In general I am interested in the answers of some particular scholars and scholarly schools to specific questions. I am almost always interested in the opinion of only one scholarly school or line."

This scholar took as an example the question. "What is art?" He was not interested in every answer to the question. He sought "research-oriented" literature but sometimes also the literature of whole schools. He said he was dealing with problem-oriented research and he knew the researchers doing this kind of research in his field. Thus he was interested in everything they wrote and published. To him subject search to a great extent meant seeking in particular previously known names of researchers. To a range of other interviewed subjects subject search had the same meaning. Another mature scholar described his "subject search" in the following way. When he started to work on a new project, a new topic, it had been preceded by a very long process. He had, for example, five years ago delivered a speech on the topic to a large audience or a short paper on a seminar or a scholarly congress. Then his interest in the topic had grown more and more through literature he had read for another research project. The material on this "new" topic grew all the time side by side with other research. When he then started to work on the new topic he had already collected a rather comprehensive body of research material as by-products of the literature search for a previous research work. Thus there was no need to seek literature on the topic from zero.
From the above described examples we can conclude that

1. To the humanities scholar subject search most often means seeking already known names of researchers or names of persons dealt with (artists, authors etc.).
2. To the humanities scholar information-seeking means a very long process. He continuously fills up his "knowledge bag" which he carries with him throughout his life as a researcher. It is never empty, except for a student or a beginner, but is growing in size all the time. At the same time new pigeon holes are added with connections to already existing pigeon holes. This "knowledge bag" is indispensable to the scholar.

8. Two main types of information-seeking

The interviewed subjects turned out to do comprehensive subject searches very rarely, hardly ever. The results of the study indicate the existence of *two main types of information-seeking* among humanities researchers. *Firstly*, when the scholar is *familiar with the subject*, the information-seeking is conducted in a specific way, and *secondly*, when the *subject is new*, it is conducted in a different way. The way in which the scholar searches for information is dependent on his or her previous experience or knowledge of the subject. In both ways of information-seeking, chain searching constitutes an important element and sometimes is the only way in which the researcher seeks information. Chain searching means that one reference gives several new references and that these are evaluated in a context.

Information-seeking when one is familiar with the subject means that the scholar has gathered references to literature on the subject over a long period of time. In such cases he does not start from zero but uses his "knowledge bag", and the references he has gathered previously in connection with other research projects. Chain searching also plays an important role. Bibliographies and reference lists of books and journal articles lead the researcher to an almost endless chain of references, which extends in all directions. It is a question of choosing the right direction, and above all the right track. Those are some of the greatest skills demanded of the humanities researcher when seeking information, skills which he himself has to possess. He derives little help from the librarian or the information specialist in this information-seeking process where information from journals and colleagues is valued highly. Bibliographical tools are hardly used at all. If they are used, they are used to check that no important material has been overlooked.

Mainly mature scholars sought information in this way. The method was seldom used by immature scholars. As a rule, the library was not used when using this method for information-seeking.

The second method of information-seeking was used when the researcher started to work on a new research project, a new subject. Then he started generally with standard works or handbooks like Musik in Geschichte und Gegenwart, Religionen in Geschichte und Gegenwart, The History of Ideas, Wörterbuch der Philosophie etc. References to literature in these standard works and handbooks turned out to be of special importance to the scholars. The review articles evaluated the literature the references referred to.

Several researchers stressed the importance of encyclopaedias in the information-seeking process which they considered to be underestimated. Encyclopaedias contain review articles which evaluate the literature to which references are listed. When the scholar has penetrated standard works, handbooks and possibly encyclopaedias, the search often continues in the subject catalogue of the library and in subject bibliographics.

This methods of seeking information was used by both mature and immature scholars but it was most common among immature scholars because the subjects they sought information about in most cases were new. They had no "knowledge bag" to use.

The two main types of information-seeking which have been described do not always occur in their purest form. Individual variations could be seen but it is legitimate to say that these two main types crystallized.

In their investigation Corkill and Mann (1978, 57) found evidence of four common types of research, not necessarily related to a particular subject field. These are: 1) The 'chronicle' type, 2) the critical or comparative type, 3) the contemplative type, and 4) musical composition. The Nordic investigation did not, however, provide any evidence of these four common types of research being connected to any particular type of information-seeking.

9. Other results

The bibliographical awareness of the interviewed subjects appeared to be low. Only one of them knew all existing relevant bibliographical tools in his field of research. Most often the function of the bibliographies was to serve as a tool for checking that no important material was missing. Hardly any of the interviewed subjects knew the national bibliography of their own country and they did not place any particular confidence in computerized information systems. A small number of the interviewed subjects had had searches done in databases but were in fact not impressed by the results of the searches.

According to a citation study conducted by Mats Cavallin in Sweden (LÖNNQVIST 1988, 106 s.) monographs are main actors of the referral system of the humanities, which constitutes the references listed in scholarly works. In the interviews, however, journals received a very prominent position. It is possible to see a connection between references to monographs in sources and the stress on the use of journals in the interviews. Journals supply research news, present new literature, publish book reviews etc. and thus serve as an incentive to the reading of monographs. Journals are much more primary information sources than the most "fleet-footed" database. They also contain more text and valued information than subject bibliographies. Since the indexing of monographs is quite superficial nowadays, researchers have to "take a detour" via journals in order to get an evaluation as to the quality of monographs. A deeper indexing of monographs would probably diminish the dependence on journals.

A large majority of the interviewed subjects expressed a wish for user education, with courses in library use and information retrieval. In general they felt positive about the use of new information technology in their research. In spite of that, their attitude to searching in databases was fairly negative.

(In the oral delivery of this paper a comparison will be made of the methods and results of several studies of the information-seeking behaviour and information needs of scholars in the humanities.)

References

1. Broadus, Robert N. Information needs of humanities scholars: a study of requests made at the National Humanities Center. – *Library and information science research*, 9 (1987) 2, 113–129.
2. Budd, John. Characteristics of written scholarship in American literature: a citation study. – *Library and information science research*, 8 (1986) 2, 189–211.
3. Corkill, Cynthia & Mann, Margaret. Information needs in the humanities / Cynthia Corkill & Margaret Mann. – Sheffield, 1977. (Unpubl. report)
4. Corkill, Cynthia & Mann, Margaret. Information needs in the humanities: two postal surveys / Cynthia Corkill & Margaret Mann. – Sheffield: CRUS, 1978. – 135 p. – (CRUS Occasional Paper, 2; BLR&DD Report, 5455).
5. Corkill, Cynthia, Mann, Margaret & Stone, Sue. Doctoral students in humanities: a small-scale panel study of information uses 1976–79 / Cynthia Corkill, Margaret Mann, Sue Stone. – Sheffield CRUS, 1981. – 66 p. – (CRUS Occasional Paper, 5: BLR&DD Report, 5637).
6. Cullars, John. Characteristics of the monographic literature of British and American literary studies. – *College and research libraries*, 46 (1985), 6, 511–522.
7. Heinzkill, R. Characteristics of references in selected scholarly English literary journals. – *Library quarterly*, 50 (1980) 3, 352–365.
8. Jones, Clyve, Chapman, Michael & Woods, Pamela Carr. The characteristics of the literature used by historians. – *Journal of librarianship*, 4 (1972) 3, 137–156.

9. Lönnqvist, Harriet. Humanister söker information eller "mötet med den litauiske skoputsaren: intervjuundersökning bland humanistiska forskare i Norden / Harriet Lönnqvist; under medverkan av Mats Cavallin. – Esbo: NORDINFO, 1988. – 135 p. – (NORDINFO-publikation, 13). English: Scholars seek information or "the meeting with the Lithuanian shoeblacker": an interview study of scholars in the humanities in the Nordic countries.
10. Perman, Dagmar Horna. Bibliography and the historian. – *Bibliography and the historian:* the conference at Belmont of the Joint Committee of Bibliographical Services to History, May 1967 / ed. by Dagmar Horna Perman. – Santa Barbara, CA, 1968. – Pp. – 19.
11. Stone, Sue. Inter-library loans: a study of antecedants and outcomes of inter-library loan requests / Sue Stone. – Sheffield: CRUS, 1983. – 138 p. – (CRUS Occasional paper, 7).
12. Stone, Sue. A review of user related research in humanities information / Sue Stone. – Sheffield: CRUS, 1985. – 51 p. – (CRUS Working papers, 1).
13. Vaughan, David L. Characteristics of literature cited by articles in the *Musical Quarterly*, 1955–58 and *American Musicological Society Journal*/David L. Vaughan. – University of North Carolina: Master Thesis, 1959.

Bringing Rural Librarianship to Canada in the 1930s

Associate Professor Maxine K. Rochester
School of Information Studies, Charles Sturt University, Wagga Wagga, N.S.W. 2650 Australia

Abstract

The setting up and operation of two demonstrations of rural library services in Canada in the 1930s paid for by the Carnegie Corporation of New York are detailed. These demonstration services were the Fraser Valley Regional Library in the lower Fraser Valley in the province of British Columbia on the west coast of Canada, and the Prince Edward Island Libraries in the province of Prince Edward Island on the east coast. Funding through local taxes was taken over by the communities at the end of both demonstrations.

The reasons for the success of these aid projects is explored in the second part of the paper. The services showed the enormous book hunger in the rural areas, and the administrative arrangements of a regional or province-wide library service which could deliver adequate services. The success factors of excellent library leaders, local community support, strategies of the aid donor, the timing, the management style for the demonstrations and the marketing practices used, together with the change agent roles adopted, are examined.

Two demonstrations of rural public library service were carried out in Canada in the 1930s; one was in the lower Fraser River Valley in the province of British Columbia on the west coast and the other in the province of Prince Edward Island on the east coast. Both provinces were predominantly English speaking. In the lower Fraser River Valley fifteen separate local governing areas joined together to provide a cooperative regional library service, in Prince Edward Island the unit was the province, and a province-wide public library service was set up. Both demonstrations were funded by grants from the Carnegie Corporation of New York as part of its library development programme for the British Dominions.

Carnegie Corporation of New York

Established in 1911 in New York, the Carnegie Corporation of New York (CCNY) had as its objective "to promote the advancement and diffusion of knowledge and understanding among the peoples of the United States ..." and of areas of the British Dominions and Colonies.[1] The grants for Canada in the period 1911–1961 amounted to $2,559,660 for library buildings and $931,978 for library grants.

During the period between the two world wars the programmes for the British Dominions and Colonies were similar to those of the Carnegie Corporation in the United States: adult education, fine arts and libraries. In 1926 a large-scale library programme began. Canada received grants for several library projects; among them were a grant of $119,000 to the British Columbia Public Library Commission 1929–36 for demonstration and development of library services and $95,000 for the Prince Edward Island demonstration of library service in the period 1933–35.[2]

Canada in the 1930s

Canada was a federation of nine provinces formed in 1867. Power resided with the provinces, rather than being centralized. There was a population of about ten and a half million, most

Canadians lived within 200 miles of the border with the United States of America to the south.

The impact of the economic Depression affected Canada severely. In the period 1929 to 1933 the Gross National Product declined by 42 percent, by 1933 30 percent of the labour force were unemployed.[3] Yet the federal government had no policies for economic recovery. The Atlantic provinces has been economically depressed since the 1920s. The movement of people from the land to urban areas ceased.

Education and libraries were provincial responsibilities. Schools were managed by local school boards, under direction form provincial education departments. Single teacher schools existed in most rural areas. Canadians attended school until age fourteen. Officially the 1931 census gave figures for the literate population ten years and older as 96 percent.[4]

There were many daily newspapers published, although numbers of copies printed declined during the Depression. Canadians read many imported books; the major British and American publishers had set up branch offices in Canada. Cheap editions from American publishers flooded the market. Canadian publishers were able to operate only inside Canada, again publishing slumpted during the Depression.[5] The Canadian Radio Broadcasting Commission was set up in mid 1933. Films were also imported and very popular, but attendances fell during the Depression.

Nearly eighty percent of the Canadian people had no access to library service at the beginning at the 1930s. As education was a provincial responsibility the idea if planning for library services in Canada as a whole had been concluded to be impossible in the document *Libraries in Canada: a Study of Library Conditions and Needs* Toronto: Ryerson Press and Chicago: American Library Association, 1933. The report of a survey which had been carried out in 1930 by three Canadian librarians, it had been financed by the CCNY. The surveyors suggested the larger library unit on the model of county libraries in the United Kingdom as the solution to the problem of providing rural public library services in sparsely populated Canada. The Fraser Valley scheme was already showing how local governing and taxing authorities could group together to provide library service. The report also suggested Prince Edward Island on the east coast as a good site for a province-wide demonstration library service. The surveyors wanted provincial governments to formulate policies for providing public library services to all citizens, whether they lived in urban or rual areas. They also wanted the Dominion government to set up a national library for Canada.

British Columbia

British Columbia (BC) had a population of about 700,000, mostly of British decent, in 1931. Public libraries in British Columbia were supervised by three member Public Library Commission who served in a voluntary capacity and were appointed by the provincial government. They administered small provincial library grants and provided some travelling boxes of books and sent out books by mail on request to rural people from headquarters in the provincial capital, Victoria. There were public libraries in the cities. Under the chairmanship of Dr Norman F Black, a teacher, the Commission had gathered information on library needs in the province in the hope of improving the situation. With a grant from the CCNY, Clarence B Lester, Secretary of the Free Library Commission of Wisconsin, had acted as advisor for the survey, whose report was published in 1929.[6] Impressed by the survey report, the CCNY donated $100,000 to support the activites of the Commission. The Public Library Commission chose a regional library demonstration as the best method of improving rural library services, and the lower Fraser Valley as a suitable area, eighty miles long and ten miles wide, with a population of 44,000. With a mild climate and plenty of rain, there was mixed farming such

as dairying and fruit growing on the valley floor and a lumber industry in the foothills of the mountains.

Fraser Valley Regional Library

The aim of the five year demonstration 1930–34 of a regional library service in the lower Fraser River Valley was for citizens to be so impressed by the value to their community of such a service that they would continue to fund the library service from local taxes after the demonstration was finished. Dr Helen Gordon Stewart, a Canadian born in 1879 who had been librarian of the Victoria Public Library in British Columbia, one of the foundation member of the BC Public Library Commission, and who had just completed a doctoral program in sociology at Columbia University in New York, assumed leadership of the library in February 1930. She had to persuade fifteen separate local political units to agree to join together to provide a regional library service. The first step was to hold public meetings in the small political units in the Valley, to arouse public interest and explain how the library would operate. Most of the population had no experience of library service. At the public meetings those present voted on accepting the library demonstration, and set up a local committee. Not surprisingly this offer of a free community service was always accepted.[7]

At the same time Stewart set up an office at New Westminster, near Vancouver in the western end of the Valley, selected staff including two permanent and one temporary professional librarians, selected and acquired the first bookstock, which was catalogued and organised for use, and acquired a truck which was converted into a book-van. The library commenced operation in August 1930. The distribution centre for the library was set up at Chilliwack, the largest town, and from there the book-van operated around the Valley. Local communities provided the accommodation and basic furnishings for the branches in the larger settlements. By the end of 1930 there were seven branches, two sub-branches, six deposit stations, three school deposit stations, and fifty book-van stops. At Chilliwack there was a professional library staff member but branches and sub-branches had local staff, their salaries paid by demonstration funds. The service to schools was not vigorously promoted at first; the school already received provincial aid funds, and the chief effort went to service to adults. They would be the people voting for local tax support to continue the library.[8]

The local residents welcomed the library services, a year after opening 13,278 residents were registered borrowers, 30 percent of the population. Stewart wrote to the President of the CCNY:

> They come to the branches from miles around, and nothing the weather can do seems to keep them from the book van when it makes its fortnightly rounds. They splash along the muddy roads in gum boots and slickers, often for one mile, two miles, or more, and when they arrive stand in the open with the wind catching them in the small of the back and the rain cascading down the points of their noses and exclaim – "Wasn't it a red-letter day for us when this bus started!"[9]

In the first sixteen months 230,000 books were circulated. The book-van followed seven routes, covering 1250 miles monthly. A year later there were a total of ninety-two points for library service, circulating 248,313 volumes. By August 1933 38 percent of the population were registered as borrowers, which didn't include children served through the schools. There were also twenty-three reading and study clubs which the library helped in organising programmes and providing books and magazines for courses.[10] At the end of he demonstration there were 19,000 registered borrowers, 120 distribution points and 24,000 volumes in the library collection. The library service was overwhelmed by the phenomenal response in the early years. Funds ran short in 1932 for the closing years of the demonstration, and the

provincial government did not give any assistance, as was expected, because of the financial situation. It was found that at least 50 cents per capita was needed to fund the library service. The CCNY made some extra money available for the demonstration.

The stock of library materials was rotated regularly. Every few weeks part of the collection was changed when the book-van called. Also there was a request service wih 500-700 inter branch requests being supplied every week. These requests were for particular titles or for subject materials. Books not held were considered for ordering, or were borrowed from BC Library commission headquarters in Victoria or other libraries in British Columbia. Also subject lists of books were prepared, and posers and displays set up in the branches.

In August 1931 a meeting was held of representantives of all the local committees, and a Central Committee of one representative from each government unit in the library service was formed to advise the director and the Public Library Commission of British Columbia on policy for the library. Looking to the future of the Service, lobbying started at the end of 1932 for amendments to the Public Library Act of British Columbia, so regional library services could be set up. A citizens' petition was sent from the Valley to the provinical government, and the amendment was passed in 1933. Then lobbying started for a vote on the raising of local taxes to support the continuation of the library service. At the municipal elections of January 1934, despite the Depression, twenty out of twenty-four districts voted to support the library with local taxes. In June 1934 these twenty districts continued the demonstration as the Fraser Valley Union library.

The demonstration was a success also in that two more regional libraries were set up in British Columbia. Wide publicity was given at many meetings, papers and photographs at conferences, articles and photographs in professional journals, and in magazines and newspapers, and a film, so that news of the demonstration regional library spread through Canada, USA and further afield. It was a pioneer in joining together separate local authorites to cooperatively provide a library service, and demonstrated the need for rural library services.

Prince Edward Island Libraries

Prince Edward Island is the smallest province of Canada, both in size and population. An island 120 miles long and about 20 miles wide, it lies in the Gulf of St Lawrence, sheltered from the Atlantic Ocean. The island was first settled in 1719 by the French and later ceded by France to Great Britain. In 1931 there was a population of 88,000, of which 14,000 were of French descent, and the rest of English, Scottish and Irish descent. The capital, Charlottetown, had a population of 12,000 and there was only one other town with a population over 1,000. The industries were agriculture, with mixed farming and fishing. The province was poor, but most farmers owned their own farms.[11]

The report of the Canadian Library Commission, *Libraries in Canada*, had picked the province of Price Edward Island as an ideal site for a demonstration of public library service for the east coast of Canada. In September 1932 the Carnegie Corporation had Dr G Lomer, the librarian of McGill University, visit the Island to give a second opinion, and his report recommended a three-year demonstration of a provincial public library service. The CCNY made a grant of $95,000 for such a demonstration in 1933. Selected as director of the demonstration was Nora Bateson, a staff member of McGill University Library School, who had also worked for a short time in the Fraser Valley demonstration. A graduate of Manchester University, she came to Canada from England in 1922 at the age of twenty-six.

On 1 June 1933 headquarters for Prince Edward Island Libraries were set up in Charlottetown. A qualified assistant librarian was appointed, books ordered, and the first four branches established in three months. As in the Fraser Valley demonstration, a meeting of citizens was called in each centre and the library demonstration explained. Bateson could carry 300

books in bookshelves fitted into the back of her modified car, so she could show people what materials would be supplied. People on Prince Edward Island had had little chance of seeing books.[12] As in the Fraser Valley local committees were set up, with local centres supplying suitable accommodation with heating, lighting and equipment, and the custodians and the collection being paid for through the central library. In 1933 McGill University Library School ran a four-week summer school for custodians in Charlottetown. Because of the long snowy winters and the poor roads a book-van could not be used to distribute books. Every summer the collections in each branch were completely changed.

By 1935 twenty-two branches had been established, with a collection of 1,000 to 1,200 books and ten current journals in each collection. One-third were children's books, and half of the adult abooks were non-fiction, some were in French. All books in the Prince Edward Island Libraries were available to readers anywhere. To make them aware of what was available subject lists were issued, in areas such as agriculture, ships and the sea, biography, economics, war and peace. There were about 150-200 books supplied in answer to requests each week. Also requested books were borrowed on interlibrary loan mainly from McGill University.[13]

The teachers in the rural schools could borrow collections, one per pupil, for two months at a time from the branches, but only 50 percent had done so. Books were also distributed to remote areas through the Women's Institutes. The Institutes aimed "to promote an appreciation of rural living, and to develop informed citizens through the study of national and international issues (particularly those affecting women and children)."[14] In the 1935-36 winter sixty-seven boxes each containing thirty carefully selected titles were sent out from headquarters, and this proved a success.

The library also helped with books and pamphlets for adult education study groups. In 1933-34 thirty-seven groups met during the winter, studying such topics as social reconstruction and oyster culture. By 1936 there were ninety-three study clubs.

The number of registered borrowers out of the population of 88,000 was 23,517, 39 percent. There were also the children in the rural schools and the people using the Women's Institute collections. The annual circulation was 261,029 in 1935. By the end of the demonstration there were 41,000 volumes in the collection. Nora Bateson noted that in winter several people read each book circulated, so that actual potential readership might be tripled. She also said that the idea of the library as a source of information was growing.[15]

A provincial library commission was secured by Bateson, comprising the Governor and the Premier of the province, and five other persons. She also enlisted the support of both the Protestant and Roman Catholic clergy. This was to ensure support for the continuation of the service.[16] The Director also provided good publicity for the service, talking at meetings, getting articles in the newspapers and providing exhibits. She also publicised the service in the other Atlantic provinces.

With a new government in the provincial elections of 1935, who came in with an austerity policy, the library service was threatened. The twenty-two local library committees organised a petition to the government, and the Women's Institutes, the churches and teachers lobbied their local members. The government grant was $24,238 in 1937 and 1938, smaller than the annual CCNY funds had been, but enough to keep the library operating.

The Demonstrations as Catalysis for Library Development

As well as the demonstration libraries continuing, new regional libraries were set up in British Columbia and a new provincial library in the Atlantic provinces of Canada immediately after the CCNY demonstrations. This happened on Vancouver Island and in the Okanagan Valley in British Columbia, and in the Atlantic province of Nova Scotia, again with CCNY seed

money. The demonstrations had shown that there was an enormous book hunger in the rural areas, and that once a professional library service sufficiently financed and of an adequate population base was trialled, the citizens were willing to pay for such a service through their taxes.

The Fraser Valley Regional Library showed the possibility of joining together a variety of taxing and governing authorites to provide library service; it was claimed to be a world first. Some rural library services for large areas had already been developed in the UK and the USA, but in single large government and taxing units, such as counties. A minimum population of 40,000 to 50,000 was proposed by Helen G Stewart, and a minimum budget of $25,000 by Charleton B Joeckel to support a regional library.[17] Also of course a qualified and able librarian in charge. The Prince Edward Island Libraries showed the possibility of a province-wide library service.

Why Where the Demonstrations Successful?

One important factor in the success of the demonstrations was the calibre of the directors: their commitment, courage, intelligence and management ability.

Stewart: C.B. Lester, the Secretary of the Wisconsin Free Library Commission, who reported on the Fraser Valley demonstration for the CCNY in 1932, wrote "Stewart has shown unbounded energy, resourcefulness, and thorough organizing ability."[18] R. M. Lester, a staff member of the CCNY, reported she had a "missionary spirit."[19] C.K. Morison, Stweart's successor at the Fraser Valley library, said of the pioneering Stewart "she was always respected and loved by her staff: she ... expected everyone to deliver one hundred per cent."[20]

Bateson: After a visit to the Prince Edward Island Libraries in 1934 Dr Milton J Ferguson, chief librarian of the Brooklyn Public Library, and a CCNY library adviser, wrote "Who can show me another small woman with the courage and intelligence of the Director of this demonstration?"[21] H H Shaw, the Chief Superindentent of Education, Prince Edward Island, added "The splendid administrative skill and organizing ability of the Director were quickly demonstrated and full confidence was early reposed in all her plans for organizing the province."[22]

The CCNY was to later use both Stewart and Bateson as directors of other CCNY demonstration projects: Stewart in the Caribbean and Bateson in Nova Scotia in Canada.

Another important success factor was the quality and support given by local community leaders and politicans. Religious leaders, teachers, Women's Institute office holders, librarians, journalists and provincial and local politicans were willing to provide time and effort to support the demonstrations. The clear objective of the educational role of the public library in the community for both demonstrations won local political support.

A survey of the existing situation had already been carried out in both BC and Prince Edward Island, a prerequisite for planning for the new services. Apart from annual reports on progress the execution of the projects was left to the local professionals and local supervising authorities. They knew best the social, political, educational and economic context. This CCNY strategy was another important success factor. The funding authority could not be accused of interfering or of trying to promote cultural imperialism from abroad.

It was a suitable time for the development of public libraries in Canada. There was an interest in educational matters and because of the Depression and political changes in Europe it was a time of questioning and search for reasons. It was also because of the Depression, a time for cheap forms of education and entertainment, so people turned to public libraries for reading materials. The circulation statistics for public libraries in the United States increased to their highest point in 1933 and then declined again. Douglas Waples thought the decline

in circulation after 1933 may have been because of the decline in acquisition of new books because of budget cuts in the Depression.[23] This was not a problem for the demonstration libraries while they had the Carnegie funds.

Another factor for success was the management style for the demonstrations. They were examples of project or program management; rather than using traditional bureaucratic structures, all activities were integrated to complete the program. There was a finite time for both demonstrations, with good strategic planning and a clear mission. Stewart and Bateson acted as focal points for all organisational matters related to the demonstrations. They had complete authority to set up and run the dynamic libraries. Their authority however did not come only from their formal positions, they were able to influence the members of their staffs and community members by their enthusiasm, ability and knowledge.

Management research has shown that in program management there is often conflict with the normal organisational structure.[24] This conflict certainly occurred in both demonstrations; Stewart was in conflict with the BC Library Commission bureaucrats at the state capital in Victoria, and Bateson with the provincial government politicians and their departments in Prince Edward Island.

The library demonstrations also applied marketing practices to their services.[25] They undertook market research and analysis of the market, that is the potential users; environmental factors affecting the consumers' behavior, such as other sources of reading materials and information; and the development of a market strategy for meeting the needs of the target market. Marketing is an exchange of goods or services, and for the library demonstrations this was a 'common good' for the community, with the educational purposes of the libraries emphasized.

In service delivery the libraries employed a marketing 'mix' of product, place, price and promotion to achieve a new market for library services. Product and place, the library collections and the location of branches and delivery stations, were carefully chosen, with local input to decision making and constant feedback to adjust to changes in demand. Library materials were made as accessible as possible, so the 'price' in terms of time and effort by the user was made as low as possible. Promotion was an ongoing activity, not only for the particular demonstration libraries to get them continued with local funding at the end of the demonstration, but also to encourage the setting up of regional rural services elsewhere. The marketing strategies of Stweart and Bateson were completely successful.

Change Agents

The definition of change agent used is that of Everett M Rogers: "a professional person who attempts to influence adoption decisions in a direction that he feels is desirable."[26] Both Stewart and Bateson were committed professionals. They spearheaded the use of personal and impersonal communication channels to spread the idea of regional public library services. Thus they used the mass media, newspapers and a film for the FVRL, exhibitions at annual fairs, and spoke to as many community groups such as the Women's Institutes and education authorities as possible. Rogers and Shoemaker conclude from studies of innovations that the mass media and interpersonal communication channels used together are the most effective way of persuading people to adopt new ideas, and this technique was used.[27] Both women also took a long-sighted view; they trained their staffs and sent them off with Carnegie scholarships to library school so they could continue the change process.

Stewart also took a research attitude to the demonstration, with the aim of assisting future adopters of cooperative regional libraries. She reported on

1) the machinery of the regional scheme in the Fraser Valley. Stewart said there were profound differences to county library organization. She investigated the ideal size of

population, the taxation areas and how autonomous bodies could be brought together, and the legislation necessary.

2) the best distribution system
3) how to make results available to the province of BC and further afield.[28]

Rogers and Shoemaker also identify two particular conditions that seem to promote change; determined effort and close attention to recipients' needs.[29] Stewart and Bateson were both dedicated to the success of their projects, and both were responsive to user needs. The committees of local representtives advised Stewart and Bateson on local needs and were always consulted about the location of branches and book-van stops. Both library services kept detailed records of book borrwing to analyse reading interests, and monitored requests for not-held items.

Conclusion

The happy conjunction of responsive local communities who wanted educational, informational and recreational materials from public libraries, the availability of grants for the demonstrations from the CCNY, together with the abilites of Stewart and Bateson as directors, and support from local community leaders, led to successful outcomes for the two aid projects. The two demonstrations show us what can be achieved by the injection of funds together with careful selection of sites, good planning and able administrators. Demonstrations can lead to adoption of resonsibilites for funding library services by the local communities, and also to adoption of such services by other communities once they can see the services operating. This all took place despite a time of severe economic constraint; rural public library services had become an essential community service.

References

1 *Encyclopedia of Library and Information Science*, s.v. "Carnegie Corporation of New York," by Florence Anderson.

2. Florence Andeson, *Carnegie Corporation Library Program 1911-1961* (New York: Carnegie Corporation of New York, 1963).
3. *Canadian Encyclopedia*, 2d ed., s.v. "Great Depression," by James Struthers.
4. Canada, Dominion Bureau of Statistics, *Canadian Yearbook 1934-35* (Ottawa: King's Printer, 1935), p. 159.
5. *Canadian Encyclopedia*, 2d ed., s.v. "Book publishing, English language," by James Marsh.
6. British Columbia, Public Library Commission, *British Columbia Library Service, 1927–28* (Victoria, BC: King's Printer, 1929).
7. Geoffrey Rex Des Brisay, "A Historical Survey of the Fraser Valley Regional Library, Abbotsford, British Columbia" (M Lib thesis, university of Washington, 1956).
8. C B Lester, "Report to the Carnegie Corporation: Fraser Valley Demonstration of a District Library System in British Columbia," November 1932. CCNY Archives, File for British Columbia Library Commission 1930-1946.
9. H G Stewart to F P Keppel, 5 February 1931, Ibid.
10. "Carnegie Demonstration of British Columbia. Progress Report, August 31, 1933." Ibid.
11. Canada, Dominion Bureau of Statistics, *Canada Year Bok, 1934–35* (Ottawa: King's Printer, 1935), p. 296.
12. Nora Bateson, Prince Edward Island's Demonstration, *"Ontario Library Review* 18 (August 1934): 111-12.
13. Nora Bateson, *The Carnegie Library Demonstration in Prince Edward Island, Canada 1933–1936* (Charlottetown, PEI: Prince Edward Island Libraries, 1936).

14. *Canadian Encyclopedia*, 2d ed, s.v. "Federated Women's Institutes of Canada," by Jean E. Dryden.
15. Bateson, *The Carnegie library demonstration*, pp. 32-33.
16. Milton J Ferguson to F P Keppel, CCNY, 19 September 1934, CCNY Archives, File for Prince Edward Island Libraries.
17. "Regional or District Libraries". Public Library Division of American Library Association, 1936. (mimeographed)
18. Lester, "Report to the Carnegie Corporation: Fraser Valley Demonstration of a District Library System in British Columbia," November 1932.
19. Memorandum of interview, R M Lester with Norman Lidster, Mary Black, Helen Stewart on 29 June 1934, CCNY Archives, File for British Columbia Library Commission.
20. C K Morison "Helen Gordon Stewart" in *As we remember it; interviews with pioneering librarians of British Columbia*, ed. Marion Gilroy and Samuel Rothstein (Vancouver: School of Librarianship, University of British Columbia, 1970), Appendix 1.
21. *The Carnegie Library Demonstration*, Foreward, p. 6.
22. *The Carnegie Library Demonstration*, Introduction, p. 9.
23. Douglas Waples, *People and Print: Social Aspects of Reading in the Depression*. (Chicago: University of Chicago Press, 1938), pp. 97, 105.
24. Fremont E Kast and James E Rosenzweig, *Organization and management*, 4th ed. (New York: McGraw-Hill, 1985), pp. 257–64.
25. P J Kotler and A Andreason, *Strategic marketing for non-profit organizations*, 3d ed. (Englewood Cliffs, NJ: Prentice Hall, 1987).
26. Everett M Rogers, *Diffusion of Innovations* (New York: Free Press, 1962), p. 283.
27. Everett M Rogers with F Floyd Shoemaker, *Communication of Innovations: a Cross-Cultural Approach*, 2d ed. (New York: The Free Press, 1971), p. 260.
28. H G Stewart to F P Keppel, 6 May 1932, CCNY Archives, File for British Columbia Literary Survey.
29. Rogers with Shoemaker, *Communication of Innovations*, pp. 226–48.

Literacy and Reading in Iceland

Darlene E. Weingand
Associate Professor and
Director, Continuing Education Services,
School of Library and Information Studies,
University of Wisconsin-Madison,
United States of America

Abstract

Iceland has one of the highest literacy rates in the world. Why is this the case? This paper examines this question against a background of geographic realities, cultural memory and oral tradition. Secondary data concerning the publishing scene, the library in Iceland and competitors for leisure time are presented.

The research methodology is derived from qualitative research and grounded theory. Fifty-seven interviews of citizens of Iceland were conducted in spring 1988. Participants included community leaders, general citizens, workers in fish factories, educators, librarians, publishers, library science students, college preparatory students and ninth graders.

Results are presented relating to language, history and literature, and an examination of reading – including attitudes toward reading, personal reading experiences, materials choices and sources, reading time preferences and locations, perceived impacts, and reading to others. Finally, two sets of theories are presented and implications for the future.

Iceland has one of the highest – if not the highest – literacy rates in the world, and also publishes the greatest number of books per household.[1] It boasts a per capita output of book titles each year that is three to four times larger than other Nordic countries and about twenty times greater than the United States.[2] Why is this true? What secrets can be learned from examination of Icelandic society and culture that might prove valuable to the rest of the world where so many nations struggle with the serious problems generated by illiteracy.

In an effort to wrestle with these questions, and in conjunction with the opportunity presented through appointment as a Fulbright Professor at the University of Iceland during the winter and spring of 1988, the author conducted a series of interviews with Icelandic citizens representing key groups. The research study was funded by The Spencer Foundation.

Background

There are a variety of factors which may have contributed to the extraordinary literacy achievement in Iceland, including: (1) geographic realities; (2) shared experiences and cultural memory, including family /cultural/institutional/community influences; and 3) a strong oral tradition (including the literature).

Geographic Realities... Icelandic authors have commented at length on the relationship between the land and the people. For example, Thorarinsson states that, "The past of the Icelandic people can never be unraveled by historians alone. The story must to a higher degree than the story of other civilized nations be read in the light of their struggles with the elements, of the changes in the geographical environment due to fluctuations in climate and drift ice, glacier oscillations, soil erosion, and catastrophic events such as volcanic eruptions, 'glacier bursts', and earthquakes."[3] These geographic realities must be considered as factors

during any study of the culture. Their import must be in relation to cultural development, however, rather than as specific geologic phenomena.

Cultural Memory... Few nations are more historically conscious or have closer links with their past than the Icelanders...this is due to the extensive written records going back to the twelfth century and covering the entire history of the nation from its very inception. These records have, literally, been in the possession of the whole people throughout the centuries and have shaped the way of thinking and feeling of every individual. This lively sense of historical continuity is the mainspring of all the national endeavors of the Icelanders today. Their past glories as wells as their age-long misfortunes are a source of inspiration and determination to overcome obstacles on the road to self-realization. [4]

Iceland also has a homogeneity that few modern countries possess. Not only does it seem that everyone in the nation knows almost everyone else, but the Icelanders' present is clearly connected with the living past as experienced through the literature. This impressive development of cultural memory has been facilitated and enhanced by a strong oral tradition.

Oral Tradition... In addition to the significant historical memory that is central to the Icelandic heritage, a parallel attribute exists in a strong oral tradition that has preserved that heritage and carried it forward in the minds and hearts of the Icelandic people. Reading was most commonly practised aloud during the entire period from the 13th to the 19th century. A travel account from 1752 contains the following: "The most sensible and useful pastime of the Icelanders is indisputably the ancient custom of reading old sagas aloud. When they have lit the light in the evenings they let a competent youth or a stranger read aloud. A farmer who likes sagas will borrow enough of them from his neighbours or acquaintances to last the whole winter."[5]

It is worth speculating that the combination of geographic realities, cultural memory and oral tradition may have had significant impact upon literacy. In any event, they serve as points of inquiry within the framework of qualitative methodology in general and, more specifically, the discovery mode of grounded theory.

Methodology

Before beginning a study, the prudent research strategy is to gather as much background information from secondary sources as is available. Therefore, the following paragraphs offer preliminary data that have been fed into the methodological process.

The Publishing Scene... "It is better to go barefoot than go without books," affirms an Icelandic proverb a connotation of survival that symbolizes the Icelanders' attachment to their literature.[6] As illustration of the significance of this proverb, an annual book flood sweeps over Iceland in November and December and has done so for decades. Books continue to be the most popular Christmas gifts and the majority of titles are published just in time for the Christmas season. A recent novelty in Iceland is the emergence of the paperback, which has precipitated the publishing of light reading and thrillers throughout the year.[7]

Yet, signs of change have emerged in the 1980s. The total book stock has increased in volume between 1981 and 1985, with a continuous rise in the amount of book stock per capita. However, between 1986–88, sales by book publishers have contracted 10%, or 5% a year, according to information from the National Economic Institute. Kristján Jóhannsson, Managing Director of one of Iceland's main publishing houses, Almenna bókafélagid, has observed that, "The book is increasingly in competition with other media; people are taking less time to read than before. This fact of competition is reflected in changes with respect to the kind of book which sells. Now there's an increasing demand for educational and technical volumes and various kinds of reference books."[8]

The Library in Iceland... Since political stability and economic prosperity were conspicu-

ously absent from the end of the first republic in 1262 until complete independence from Denmark was regained in 1944, the development of libraries was retarded in like measure. Around the turn of the nineteenth century, the first efforts toward the development of libraries were made through the emergence of reading societies and corresponding subscription libraries, efforts which were relatively short-lived.

The *National Library of Iceland* (*Landsbókasafn Islands*) is the largest library in the country and was founded in 1818. Before that date, there existed no public collection of books or manuscripts, unless one wishes to count libraries of texts and records gathered by monasteries and cathedral churches before the Reformation. By 1985, the National Library possessed some 380,000 volumes of Icelandic and foreign works and approximately 14,000 manuscripts. It claims to have a copy of virtually every book printed in Icelandic, excluding some of the very oldest, exceedlingly rare copies.[9]

The *University Library* (*Háskólabókasafn*) was founded in 1940 to meet the teaching and research needs of the University, which was itself founded in 1911. In 1983, the University Library collection numbered 230,000 printed books (no manuscripts) and, while primarily used by students and faculty, it is also open to the public.[10]

Public libraries in Iceland have their genesis in the eighteenth and nineteenth century reading societies and are not "free" in most Icelandic communities. Rather, the concept of subscription still governs library practice and is an inheritance from the early reading societies. The majority of data collected in terms of library use has focused on circulation and book stock. The data, collected for the period 1981–1985, illustrate extensive library usage, but also indicate what can only be regarded as significant decline in use over the period cited. While it is too early to draw definite conclusions, these figures are very important to the development of theory and must be factored into the final conclusions.

Competitors for Leisure Time... Iceland, a nation of 250,000 people, supports two television stations, six radio stations, five dailies and countless weeklies and magazines.[11] Further, there are artistic and cultural efforts the equal of nations of much larger size, such as the official national institutions of the library, theatre, opera, dance, and gallery, plus numerous local efforts. An increasing number of people are watching Icelandic National Broadcasting Service (R'UV) television programs, according to a survey conducted by Gallup of Iceland. The percentage of survey participants watching R'UV increased from 55–59% in 1988 to 59–72% in 1989. Programs broadcast by independent pay Channel 2 were watched by 44–48% in 1989, up from 41–47% in 1988.[12] In addition, the observer will find that numerous video stores have popped up in virtually all communities. These stores and VCRs are adding a whole new dimension to media use. As mentioned earlier, there is significant competition challenging the book and reading for the precious hours of leisure time. This reality, too, must be taken into account when assessing interview results.

Qualitative research and grounded theory

Much of the world's research is conducted using quantitative methodology and experimental design. While this approach to research is highly valued and has produced meaningful and lasting results, another branch of research design has been markedly underrated. This neglected branch – qualitative methodology – suffers from low social prestige but, since it relates empirically with the subject(s) under analysis, it can provide insights into the objects of study that are otherwise less likely to occur. Therefore, the nature of in-depth interviewing as a research strategy creates an optimum environment in which mental and social processes can be studied within a participative interaction between interviewee and interviewer. The empirical social world is examined by requiring the researcher to interpret that real world from the perspective of the subjects of investigation.[13]

Rather than formulating a hypothesis and going on to test it (the experimental design model), qualitative methods engage in theory construction during the process of the research effort. One term commonly attributed to this mode is "grounded theory." "Grounded theory" can be defined as the *discovery* of theory from data systematically obtained from social research.[14] Because the theory formation is allowed to evolve, rather than being the initial driving force behind the research, a universe of possibility is opened to the researcher. The process allows for serendipity, for inclusion of the unexpected.

Therefore, although this paper began with a few facts, these data will serve not as predicators but as illuminators of the process as it emerges. Much is known statistically about Iceland and its publishing and literacy rates. Little is known as to "why" these data exist. Various theories suggest that isolation and the environment are responsible; but no one really knows. A strong oral tradition is another possibility... perhaps. Grounded theory will absorb all these bits of promise and allow them to flow along together until, hopefully, they merge at long last into a final hypothesis.

The interview process

Categories of interviewees were designed to represent a cross-section of Icelandic society. 1) Persons directly involved with the educational process; 2) Citizens of varying backgrounds; and 3) Students to give insight into attitudes and experiences of the next generation. Fifty-seven Icelanders participated in the study and are classified as follows:

- Group I... Community leaders, general citizens, workers in fish factories (N=21)
- Group II... Educators, librarians, publishers, and University library science students (N=21)
- Group III... Students: Menntaskoli students (college preparatory) and ninth graders (N=15)

The lessons from Iceland: language, history and literature

Seven of the twenty-eight interview questions had direct correlation to the language, history and literature – the Icelandic heritage. These questions relate to language facility, the sagas and folktales, and knowledge of national history and literature.

Language: an inter-cultural expression

All of the persons interviewed could read in more than one language. This was not unexpected, as Iceland has scholastic requirements for multiple language proficiency. Each interviewee was asked in which languages reading proficiency had been attained, and approximately what percentage of overall reading took place in each language.

All respondents were fluent in Icelandic, their primary language; other languages cited included English, Norwegian, Swedish, Danish, Spanish, German, Latin and French. What does this language profile suggest? The heavy emphasis on Icelandic as the language of preference supports the cultural patterns that have developed over the centuries, patterns related to heritage, community, and national pride. But other nations have similar scholastic requirements and yet cannot claim the literary accomplishments of the Icelandic people. Why is Iceland different?

Although a formal school system is relatively recent in historical terms, the Icelandic devotion to learning and scholarship can be traced back to the early years, to at least the eleventh century. In the twelfth century Icelanders were famous in Scandinavia for their interests in history and poetry and, in the middle ages, literacy appears to have been much more widespread than in most other countries of Western and Northern Europe. It would seem, therefor, that Iceland's literacy level cannot be explained by multi-lingual talents, since past liter-

acy seems tied to the vernacular and to periods of history that were generally mono-lingual. The next area to explore lies in the hypothesis that literacy is more likely to be tied to the cultural heritage.

The legacy of history and literature

To the key questions about the importance of knowing Iceland's history and literature and possible linkage to sagas and other oral tales, there was nearly unanimous belief in the importance of the Icelandic heritage. Comments included:

- It helps us remain special.
- We have to protect our identity as Icelanders.
- It is important to be aware of one' s own history and culture.
- It gives you value, roots.
- It is important to know how you can influence your generation.
- The key to everything of Iceland is to be an independent nation.

However, opinion was split as to whether interest in reading was directly affected by this knowledge. Two-thirds of the interviewees felt that it was influenced, while the rest did not agree.

Level of Knowledge... Overall, thirty-eight respondents (67 percent) felt that they had a good to excellent knowledge of the history and literature; of these, 42 percent learned at home from parents and/or grandparents. Only seven in the librarian/educator group (Group I) and five in the citizen group (Group II) felt that they did not have a good knowledge of Icelandic history and literature, and many of those phrased their replies as, "Not good enough."

While the majority of respondents in Group I have passed on this knowledge, half of the citizen group have not. Sinze Group I was academically-oriented, it seems in character that history and literature would continue to be highly valued. The outcome in Group II may be a harbinger of change as two income families have become the norm. This poses some serious implications for continuity of cultural transmission.

The students were evenly divided as to their knowledge level. They had almost unanimously picked up their knowledge of history and literature in school; only two students even mentioned home as a source of information. This result certainly ties in with the citizen group outcome above, where transmission of knowledge is not occurring in half of the situations. This trend appears to continue onward as only three students had passed on any information to others.

Sagas and Folklore... Everyone in Group I and all but one factory-worker in Group II and one student in Group III had knowledge of the *sagas*. The average number of sagas read clustered around five, and most respondents remember first encountering sagas between the ages of seven and ten. A second intensity of exposure occurred in the teen years when the sagas were studied in school. There was no dominant channel for learning about the sagas and all of the following methods were cited: parent told the stories; read it on my own; heard them on the radio; heard them in school (read by the teacher); read them in school.

Folklore was popular with all interviewees. Many folktales were encountered through storytelling: others were familiar because home libraries had collections of tales. More oral tradition seemed to be connected with folklore than with sagas, and grandparents as well as parents were identified as storytellers. Elf tales, fairy tales and ghost stories were all mentioned as part of folklore, and the age of first encounter was pre-school for some of the respondents.

When asked *who told or read these tales to them,* eighteen (86 percent) librarian/educator respondents traced memories to family members, including extended family. Fifteen of the

citizen group (71 percent) attributed such telling/reading to family and only eight (fifty-three percent) of the students could remember being read to by family.

Those who *passed tales on to others* often share in a very personal way. Overall, thirteen librarians/educators (62 percent) eleven citizens (52 percent), and five students (33 percent) admitted to relating folktales to others. When student response is combined with the decline in transmission of history and literature discussed earlier, the case can be made that this signifies an emerging trend in the cultural fabric. If so, the literacy rate may be subsequently affected.

Thirty respondents (53 percent) saw a definite *connection* between sagas and oral tales and their interest in reading. The least enthusiastic response was from the students (only two positive responses) which may add more evidence to support a lessening emphasis on the oral tradition.

An examination of reading

Examination of the early history of Icelandic print literacy must acknowledge the underlying importance of history, poetry and literature – a baseline of cultural literacy. In addition, the location and climate of Iceland are factors which must also be considered in the search for the building blocks of Icelandic literacy. However, the catalytic impetus provided by religion – and, more specifically, government-enforced religion – must also be recognized. The influence of Lutheran pastors and the Danish king in requiring examination of children's reading ability was a definite causal agent. By assessing the influence of the church, climate and isolation, and the gathering of family together on winter nights, a reasonable case can be made for theory construction that regards these elements as significant motivation for the reading skills developing through the centuries. But in the twentieth century, these variables have changed significantly.

- Iceland is no longer governed by Denmark; independence was achieved in 1944.
- Religion is nominally important, but pastor visitations are no longer mandated.
- Climate is relatively unchanged, but Iceland is increasingly part of the world community and Icelanders travel extensively – diminishing the variable of isolation.
- The kvoldvaka (evening reading) died out as a prevailing custom in the 1920–1930s.
- Families often have two wage-earners.
- Individuals frequently have more than one job.

Consequently, the continuing high level of print literacy may trigger several hypotheses:

1) This level is an extension of the previous heritage and changing conditions may have grave effects in the future;

2) The level has been high, but, in reality, has been declining incrementally; and

3) Literacy is so strongly imbedded in the heritage that societal change.

Other theories may surface when new information or trends emerge, but these three hypotheses will be examined in the light of interview responses.

Attitudes toward reading

When the question was posed as to whether reading was "liked"or not, only five persons responded in the negative. Of these, three were ninth graders, who claimed to being "not interested", "would rather go outside", and "just not liking it". Beyond liking to read, the perceived importance of reading is an important attribute of literacy. Reading was rated as an important activity by the majority of respondents. Ninety-five percent of the interviewees regarded reading as at least average in importance. These figures correspond in a consistent manner with the data concerned with liking to read.

Reading speed is yet another perspective to be considered. Forty-nine percent consider

themselves to read at a high or very high rate; 91 percent believe themselves to be at least average readers. Since ability is often tied to whether one likes or enjoys an activity, these results support the previously discussed data and there continues to be a consistency among the various statistics reported.

From these responses, it is apparent that reading is definitely still an important part of the Icelandic world. Reading is perceived as an enjoyable activity and respondents have a positive image of their ability to read.

Personal reading experiences

Since reading has been described as a desirable activity, a follow-up line of inquiry into memories of childhood and the developmental years is indicated: How much were interviewees read to as children? How young were they when they learned to read? How well did they score on reading tests in school? These questions help to clarify whether early experiences have shaped behavior later in life.

Early Memories of Oral Reading... To the questions concerning whether or not they were read to as children, only ten (18 percent) replied that they had not had this experience. Of those majority respondents who had received oral reading, seventy-seven percent indicated that parents had been readers. In addition, the extended family was very influential in this early reading pattern. Fifty-two percent of the respondents cited grandparents and other relatives as readers. In all cases, the reading had begun during the preschool years, most typically by the age of three.

First Memories... The most frequently cited early memories revolve around folk and fairy tales, whether read aloud or told as stories. Since children around the world relate strongly to imaginative literature, this finding is not surprising. While imaginative literature was dominant, it is clear that these early experiences were powerful ones and persisted in active consciousness into early and late adulthood. Such recollections can be very influential as motivators of behavior.

Reading Proficiency... Two interview questions were focused on reading in terms of when basic skills were attained and subsequent proficiency in school. Overall, thirty-four (60 percent) of the respondents specifically remembered learning to read prior to entering school. This relative norm of early reading suggests two assumptions: 1) that reading was a strong societal value and 2) that families were directly involved in this learning process. The evidence is mounting in support of Hypotheses #1 and #3, which focus on the importance of heritage and socie' ' continuity.

Materials choices and sources

Interview results have documented positive motivation for reading in terms of both attitudes and experiences. Building upon this data, the next set of questions asks: What is read and where does it come from?

First choices can be enlightening. While all memories are special, representative comments clustered around home, libraries, books received both as gifts and purchased, and particular books. The template for reading was established very early in life; the pattern has endured. Moving into the present, individuals were asked about current reading material. All major formats – books, magazines, and newspapers – were heavily read.

Sources of Materials... Materials were secured from a variety of sources: some were purchased; others were received as gifts or were borrowed from friends. Public, home and school libraries were also avenues for locating reading material. (Since school libraries are a fairly recent development, patterns of habit have not been securely established.) The workplace was cited by a few.

Purchasing was the most popular choice of the interviewees, with use of the public library as a strong second choice. When asked whether there was access to a public library during childhood years, fifty-three (93 percent) responded affirmatively. This strong public library background has resulted in a continued high level of usage in later years.

In addition to public libraries, many interviewees also cited use of home libraries and everyone either had a personal library or used their family's library. Twenty percent of those interviewed in Tomasson's 1971 study[15] estimated home libraries of 500 or more volumes; forty-two percent of the 1988 interviewees claimed libraries of this size. More than double the earlier figure, this result suggests that interest in personal home libraries is increasing – which may account for the decline in public library circulation discussed earlier and adds more weight to the two hypotheses that emphasize a continuation of the heritage.

Reading time preferences and locations

The conclusions that reading is desirable and that libraries, both home and public, are favorably viewed as sources of materials lead to the questions: When and where does reading take place? Pre-bedtime reading is the favorite of those interviewed, with evening and vacation reading trailing behind. While these results might be generalized as human reactions, it is important to recognize that, at the time of the interviews, there were two television stations – the state-sponsordsed channel 1 and pay channel 2 – and that the state channel typically aired between 6 p.m. and 10:30 p.m. This scheduling left the pre-bedtime slot free of television competition unless a subscription to the pay channel was in place. In addition, the responses which cite "daytime" "after school", and "in the morning" (a total of 15), if clustered, would also exist outside the television "window".

The other side of this television pattern, however, is that there would have been direct competition during the evening hours--and evening reading placed second in the ranking, suggesting less effect of television on the allocation of leisure hours. In addition, radio and video cassettes remained viable competitors throughout the day and evening and seem to not have appreciably cut into the time allocated to reading.

Seasonal Patterns... Moving from a daily pattern to one that is seasonal,twenty-four respondents (42 percent) expressed a preference for reading in the winter, but twelve (21 percent) decidedly favored summertime, particularly in terms of recreational reading and thirteen (23 percent) saw no difference in their reading patterns. This data gives some support to the theory that darkness and cold are strong motivators, but the results are not compelling.Rather, the evidence suggests that personal style rather than societal mode is the prime mover.

The Ideal Setting... When asked to imagine an ideal setting for sitting down with a book, a full range of scenarios emerged. Factors of comfort and sensual pleasure were continually expressed. The bedroom again topped the list; tied for the highest ranking was the favorite chair. The coziness of reading inside while bad weather raged ranked next, followed closely by food and drink and the luxury of being alone. However, no single factor was cited in isolation and scenarios were generally proposed that included multiple elements.

Perceived impacts on reading

Why is reading this important? Interviewees were asked about a variety of possible factors that might have had an impact on their interest in reading and/or their ability to read. The responses add conclusive evidence to the theory that weather, climate and light are determinants in reading motivation, although the adults appear to be more affected than the students.

Expectations are the most significant motivators, however, whether coming from family, school or community. Since expectations are intrinsically tied to the Icelandic heritage, and

all groups (including students) highly valued the impact of expectations upon their reading, this data strongly supports the third hypothesis: that literacy is so strongly imbedded in the Icelandic heritage that societal change cannot fundamentally affect it.

Reading to others: continuation of a heritage

Only one publisher, one library science student, one community leader, one citizen, one factory worker, and four students denied that they read to others (total of nine, or 16 percent). Simple arithmetic results in an 84 percent affirmative response, demonstrating a strong continuation of the reading heritage. Family members were most frequently the audience for oral reading and, of these, the overwhelming majority were children. Reading began when the children were preschool in age, most commonly between ages 2–3. The most popular reading materials were children's books and fairy tales.

Conclusion

Using the methodology of qualitative research and grounded theory, two sets of theories have been presented, theories which evolved through examination of previously written material and were subsequently refined through interviews. To summarize, these theories state that:

In the Past... There are a variety of factors which may have contributed to the development of an extraordinary literacy achievement in Iceland, including:

- Geographic realities
- Shared experiences and cultural memory, including family/cultural/institutional/community influences
- A strong oral tradition

The Evidence for the Past... The Icelandic interviews reinforce a theory of consolidation, as they have highlighted the importance of history, literature, and reading to present day Icelanders. It may then be reasonably concluded that all three theoretical factors – land, heritage, and cultural sharing through oral transmission and literature – have measurably contributed to the development of Icelandic literacy in this century.

In the Present... Today's literacy level can be explained as follows:

- This level is an extension of the previous heritage and changing conditions may have grave effects in the future
- The level has been high, but in reality, has been declining incrementally
- Literacy is so strongly imbedded in the Icelandic heritage that societal change cannot fundmentally affect it

The Evidence for the Present... Today, a changing world has made inroads into traditional Icelandic identity. Yet, many of the interviews have suggested that the third theory is the strongest, that even changing conditions will not seriously impair the cultural and print literacy levels that presently continue at the highest level. Popular sentiment professes that the Icelandic heritage has, at least so far, resisted major negative impact from the global society and developing technologies. However, since the influence of television and video is presently taking hold, it is too soon to anticipate what the level of media literacy might be some decades into the future and whether media influence may subsequently affect print literacy accomplishments. The overall results suggest limited impact, with the largest number of interviewees watching television between six and ten hours per week and videos less than five hours per week. Almost half of the total group own VCRs, but not one owned a satellite dish (although several dishes can be seen in and around Reykjavik). However, when the younger students are spotlighted, this rather benign result changes; ninth graders are heavy televison watchers and also include videos in their leisure hours. Does this indicate a trend that,

together with other societal change, will have significant impact? Many interviewees believe so and express sincere concern and a genuine sense of foreboding.

Therefore, there is sufficient evidence present in these interviews to suggest that the first theory must be given serious consideration. While many Icelanders believe in the invincibilty of the culture, it would be naive to affirm that position. In addition, the second theory, which makes the claim that decline has aleady begun, also is reflective of these sentiments and cannot be completely discounted. However, theory #1 has been selected as most probable because it reflects a balance between positive and negative views and recognizes the potential impact of change. Time may prove it to be an insufficient explanation, and other theories may rise in prominence.

Implications for the Future... What does it all mean? If Icelandic literacy is threatened by a variety of change agents, what does this tell the rest of the world? What coping strategies can be developed to ease the stress and strain of societal change? A beginning can be made with the creation of lists. What have been Iceland's strengths, qualities that have created a nation with 100 percent literacy? Based on the interviews, the following elements emerge:

- A strong sense of personal independence and belief in survival
- The importance of the immediate and extended family
- A sense of interdependence within the nation
- An intense feeling of community
- A reverence for the language as a precourser of culture
- Strongly held traditions, including the oral tradition
- Belief in nature,land, and folklore
- Effects of geography, climate and isolation
- Regard for reading as the ultimate source of knowledge

Once these positive factors are identified, the search then moves into the minus column. What new or emerging considerations are challenging the literacy standard? These items have been cited:

- Urbanization
- Centralized schooling
- Movement of learning from home to school
- Two income families
- A higher standard of living
- Decrease in live-together extended families in cities
- Television and video
- Increasing options for time
- Membership in a world society

This last list contains factors that reflect a culture that is moving from rural independence to an urban scene that makes very serious demands: centralization of services; high technology; increasing standard of living and the accompanying aspirations; changing family structure; interface with other cultures, and more complex lifestyles. The system of values necessarily is shifting from the simpler configuration of the countryside.

Yet, none of the elements on the positive list are exclusively tied to a rural setting. All of the factors could be implemented into the urban setting and, in some cases, this is being done. Whether the majority of Icelanders are able to make the shift, whether the youth of the nation will perceive the importance of doing so – these are key questions which hold the future of literacy in balance.

In terms of other nations of the world, the lessons can be simply stated. There are values engendered by familiar and other inter-personal relationships, cultural traditions, and personal self-worth that are interrelated and interdependent. If these three levels – indi-

vidual, family and the larger society – send and receive consistent messages regarding these values in general and reading and education in particular, then literacy is the sum of the equation. Where messages are mixed – or absent altogether – then confusion results and the necessary effort to achieve literacy is not expended.

Notes

1 Brad Leithauser. "Iceland A Nonesuch People," *Atlantic* (260:3, September 1987), 32–41.
2 Jóhannes Nordal and Valdimar Kristinsson: *Iceland 1986: Handbook Published by the Central Bank of Iceland* (Reykjavik: The Central Bank of Iceland, 1987), 327.
3 Sigurdur Thorarinsson. "Population Changes in Iceland, "*Geographical Review (51:4), 519–533.*
4 *Sigurdur A. Magnusson. Northern Sphinx: Iceland and the Icelanders from the Settlement to the Present* (Montreal: McGill-Queen's University Press, 1977), 1.
5 Eggert 'Olafsson: Far? bók, as quoted in Eiríkur Hreinn Finnbogason, "The Icelanders and Their Books," *Scandinavian Public Library Quarterly* (Vol. 16, No. 4, 1983), 109.
6 Bernard Scudder. "Transplanted Tradition," *Iceland Review,* (Vol. 25 No 4, 1987), 27.
7 "The Book Stands Firm," *News From Iceland* (No 167, January 1990), 16.
8 "Publishing business shrunk by 10% in 1986–88," *News from Iceland* (July 1989), 15.
9 *Iceland 1986,* 314.
10 *Iceland 1986,* 315.
11 Halldór Gudmundsson. "Miracles in a Miniature Society," *News from Iceland* (No. 167, January 1990), 4.
12 "State TV Viewing on the Rise", *News from Iceland* (No 167, January 1990), 6.
13 William J.Filstead, ed. 6-7.
14 Barney G. Glaser and Anselm L. Strauss. *The Discovery of Grounded Theory: Strategies for Qualitative Research* (Chicago: Aldine Publishing Company, 1967), 2.
15 Richard F. Tomasson. *Iceland The First New Society* (Minneapolis: University of Minnesota Press, 1980), 134.

Development in Reading in Yugoslavia

Durda Mesić
Public Library Consultant, Development and Research Department,
National and University Library, Zagreb, Yugoslavia

Abstract

According to recent research (which is only partial) every second Yugoslav reads more than one books a year which seems to be progress in comparison to a 1973 study. Younger, women and the higher educated read more. The majority of readers read fiction, with a prevalence of history novel. About 27% of the population buys books, 11% lends in public libraries and about the same from friends.

This unsatisfactory level of reading culture is due to historical background economic development of regions, literacy, production and the availability of books as well as the existence and utilization of public libraries.

In the paper the author analyzes conditions for reading in the Yugoslav cultural area in the past as well as results of reading research conducted in 1980s.

The total historical and cultural development of a country considerably influenced reading habits and needs of its population. Within a limited space of this paper we can give just a rough presentation of development of some basic conditions for reading in the Yugoslav cultural area (1) until the present day. We refer to general literacy, production and prevalence of books as well as to the existance and utilization of (public) libraries etc. Exact data on reading are obtained from investigations that have been performed in Yugoslavia rather late, partialy and often methodologicaly unreliably.

In the Midle Ages (from the 10th c.) the written culture in Slavonic scripts, Glagolitic and Cyrillic, was developed in South-Slav countries being naturally restricted to the narrow circles of clergy like elsewhere in Europe. The Reinaissance whose influence was most srongly left in Dalmatian towns brought about literature in national language and Latin letters. At that time develop libraries which learned humanists left as foundations to monasteries and towns. The Republic of Dubrovnik, free and open to cultural influences, supported monastic libraries on condition that learned secular persons could use them. But some single and rare private, monastic and founded libraries make evident that the book and reading belonged to the elite and isolated spiritual enclaves of the society of that time. That for centuries established picture was only partially changed by the brief flash of Reformation that influenced only Slovenia and Croatia on its margins. The well-known Slovene reformer Primož Trubar wrote in 1562 that "thank God, also Slovene peasants and children read books well and smoothly". Hardly any nation could find in the folk such evidence at that time. At the end of the 18th c. greater or smaller educational reforms of Maria Theresia were performed (depending on the status of certain country within the Monarchy) in the countries belonging to Austria-Hungary. Without regard to their primary aim-absolutist rationalisation of government and army- the reforms brought about the introduction of compulsory primary school system. Serbia and Crna Gora introduced compulsory schooling later, at the end of 19th c. It is hard to estimate how many children were comprised by it, but certainly masses remained illiterate until recent times with the exception of Slovenia and parts of Croatia.

A well-known historian E. Hobsbawm took South Slavs as an example of a completely

illiterate nation after the Napoleonic wars. He quoted that in 1827 there were only 0,5% of literate, and even much later only 1% Dalmatian recruits in the Austrian Army could read and write (we do not know whether this applied to German). According to the Austrian census from 1900 the Slovene language group had 23% and the Croato-Serbian 75% of the illiterate. Parallel data for the Czech-Moravan-Slovak group show only 3% of the illiterate population, than 16% for Italian, 40% for Polish and 75% for Roumanian. Data about Croatia in 1900 are somewhat different and report 58,5% of the illiterate. In 1910 one can again compare data for Croatia (48,4%) and Slovenia (14,6%).

Yet, during the 19th c. the ascending middle class founded in South Slav regions reading-clubs and libraries. Along with them developed on the model of developed Europe the literary and political public. Waking of national consciousness (Croatian, Serbian, Slovene, and the joint South-Slavic in form of the Illyrian Movement) gave rise to journalism and publishing in the national language. The bookseller's network was spread. So in 1903 there were 128 booksellers in Serbia and 15 in Voivodina.

Finally, at the turn of the century grew the awareness of the need for national enligtenment. It gave rise to the movement for establishment of public libraries. We may say that foundation of public libraries and the fact that they were visited by common people from the folk established our topic-reading-as a unviersal problem of the modern society. Active book reading became one of the key measures of cultural development of a society. At the time we talk about people believed that by spreading of education, general literacy and availability of books practically all people would become active readers, that they would not be able to resist the magic call of the nice written word. So the whole society would be improved. It turned out that the objective assumptions for reading are necessary and that they doubtlessly influence the rate of readers, but that they are not sufficient to have the majority of people to read. But I suppose that this problem will be discussed in reports from more developed countries.

Talking about the Yugoslav countries we should have in mind that in the first common state and in its brief interwar history main preconditions for developed reading culture were not created, though a certain progress was achieved. The census from 1921 reports furthermore a high percentage of illiteracy: 65.43% in Serbia, 32.15% in Croatia, 80.55% in Bosnia and Herzegovina, 67.02% in Montenegro, 73.86% of the illiterate in Macefndonia refer to a year later. Out of 13.934.038 inhabitants in Yugoslavia in 1931 6.197.916 or some 45% were still illiterate. Differences between some regions of the country remained drastic. The illiteracy in Kosovo is far the highest 90%.

Booksellers' and publishers' network was spreading over the whole country. In 1935 there were 209 booksellers in 71 places in Serbia, 128 booksellers in 56 places in Voivodina and 15 booksellers in 5 places in Kosovo.

The number of various types of libraries grew considerably as compared to the previous period. Some of them continued the activities already begun, but also many new were opened. Very often there were small improvised libraries lacking space, with poor and unattractive holdings and unprofessional staff. All that could not attract a larger number of users. Relatively well operate central town and social libraries (libraries of workers, peasants, cultural-educational, denominational and other associations).

There are no systematic data on membership and book lending in libraries. But according to different examples one can draw a conclusion that libraries included rather a small part of population except in Slovenia and probably in some towns. According to the data for 1927 stated by B. Gerlanc we have calculated that over 10% of the population of the then Drava Banat (one of the 9 banats whose boarders mainly corresponded to today's Slovenia) were users of public libraries and that their holdings had somewhat more than half a book per

capita. It is difficult to state the general trend of growing acquisition and membership. Yet this was found out for a number of libraries that in addition to the regular acquisition organised depository stations and mobile units. In general, libraries were open to all population categories, but schoolchildren and students prevailed. Very probably each second student was a user of a public library. By way of illustration we shall give a few different examples of libraries and their membership in other parts of the country. The Town Library of Belgrade registered in 1931 25.480 adult visitors (1.269 adult members) and 5.416 children (629 members). A year later there was a total of 33.909 adult visitors and 2.649 children (a total of 1.174 new members). In 1931 Belgrade had 238,775 inhabitants, so that 1% of the population were members of public libraries! In Šabac, a small town in north Serbia, in 1935 were lended 4,010 and in 1937 3,862 books. Readers were lawyers (22), judges (32), officers (30); priests (10), professors (50), physicians (40), students (53), teachers (90), clerks (248), pensioners (150), private persons (133), pupils (1077), merchants and craftsmen (70) – a total of 2005 users.

The National-liberation war and the authentic socialist revolution made the traditional peasant masses take part in it socially mobile and moreover introduced in them aspirations for social promotion. Moving to town and entering government employment (practically the whole economy was nationalized) were objectively connected with the need for elementary literacy. Additionally, socialist authorities started out of ideological reasons the nation-wide neoenlightenment campaign for mass literacy teaching and education, first of all the ideological one. The starting point was that capitalism intentionally held masses in darkness and that education, correctly ideologically aimed would simply develop national consciounsness. For the socialist voluntarism spreading enlightenment – en masse is nice. Pointed out were slogans "each house, block, working unit should have a library".

However, there were not enough books (many were destroyed or carried away during the war) and space for so many libraries that emerged all over the country and particularly professional staff was lacking. But they were ardently registered in official reports of state and party commissioners for culture and education. Their number was very probably exaggerated in order to demonstrate great progress in the socialist cultural development. According to the data of the Ministry for science and culture of the Federal People's Republic of Yugoslavia there was a total of 9.772 public libraries with 3,102,964 books and 1,831,198 readers in 1948. So one book came on every five inhabitants in Yugoslavia. Out of 15,841,566 inhabitants about 12% were members of public libraries.

For that period it was a very high percentage of membership in libraries, if real, especially with regard to the fact that it was a country where after the war every second inhabitant was illiterate, and in some regions literacy was a sign of elitism. That the cited "offical" data about the membership in public libraries should be taken with a restriction show later polls and more objective statistical data. A poll taken in Slovenia in 1954 registered 84,337 members, what made 5.6% of inhabitants in this republic, and 1.381,273 lended books. According to data from 1956 3% of inhabitants in Bosnia and Herzegovina were library users.

Yet, it is probable that in the postwar period thanks to the enthusiasm of masses and activism of new authorities in a short period an important step forward was done in developing reading culture. Mass literacy teaching, spreading of libraries and their accessibility to a common man made basic conditions for reading as a normal cultural need. It is very likely that relatively many people really began to read at that time. Another question is why this trend, not only the fast increase in the relative number of readers but also concerning the reading quality, did not continue. Anyway, there are several reasons, some of them are the way of living of the general public, penetrating of the new non-reading culture, and some have deeper antropological nature. At any case later, state and development of reading in

Yugoslavia becomes an increasingly expression on a complex organic cultural development, and less of the direct state and party intervention. This facilitates a comparative research with western democratic societies.

After some time the number of libraries became stable. Thus a basis for rationalisation and development of a modern library network as a fundamental infrastructural condition for reading was created. As early as 1952, when regular statistics about libraries were started, considerably less librarise were registered (with more than 250 books) than a few years before –1,688. In 1961 operated 3.065 units. According to the statistics from 1986 in Yugoslavia 2.012 public library are registered units out of which 1.827 are in settlements and others are in factories and institutions.

Since 1961 statistical data about the registered library users have been collected. Since then the number has been slowly rising – from 7% of the population (1.305.000) to 10% (2.312.000) according to the data from 1986. But book loan has been increasing faster.

In 1961 a total of 13.617.000, and in 1986 some 37.666.000 books were lended. Parallelly, holdings grew from 7.969.000 to 28.060.000.

The total state of affairs disguises the real situation in numerous small public libraries that do not have funds to renew their collection regularly and make them attractive to (potential) users.

It is important to be mentioned that users are generally readers, because holdings containing audio-visual material are in Yugoslav libraries very rare and poor.

Almost every second user in public libraries is a boy or a girl from a primary school, and a quarter of members are secondary school pupils and students, who most frequently borrow books.

Although the Yugoslav library standards (a book per capita) are lower than those in the world, and public libraries are late in transformation form traditional to modern library and information centres of the local community, they cannot alone be responsible for unsatisfactory reading culture of the average Yugoslav. According to some indicators Yugoslav publishing trade is relatively more progressive. In the comparative analysis of publishing production in ten European countries (Belgium, Bulgaria, Czechoslovakia, the Netherlands, German Democratic Republic, Poland, Sweden) Yugoslavia took the fourth place by the number of published titles. In a UNESCO report Yugoslavia is by the number of published translations among the first twelwe countries in the world, whereas by the absolute and relative edition it takes some twenty-fifth place. Also Escarpit ranges Yugoslavia among great translators' countries. Data on considerable increase in book selling suggest that people read perhaps more than data about library visits shows. In 1965 were sold 9.516.000 books and journals (without school books and textbooks), and in 1987 109,773,000. In 1965 were published 99.000.000, and in 1988 94.000.000 books and journals.

Despite the immense progress in literacy the situation is still not satisfactory, although the criterion of literacy is a finished elementary school (eight years) that is compulsory in the whole country. Between the census in 1971 and 1981 the population rate without elementary school education decreased for one fifth, from 62,5% to 44,3%. The lowest population rate without elementary school had Slovenia (26,2%) and the highest Bosnia and Herzegovina (49,7%). The last census in 1981 registered 20% of population with elementary school, 25,7% with secondary, and 5% with two-year post-secondary school qualifications and university qualifications. About 7,5 million adults still do not have elementary education, so they can be hardly counted in the potential reading public.

The first specific "research" into reading was carried out immediately after the War by studying and classifying public library users into different psychological types in order to

direct their interest toward "good literature". The reseraches were induced by Rubakin's theory (2).

Scientific research into reading problems started as late as the seventies, but unfortunately, only one was carried out for the whole country (3). Here we shall report results of this research, and then of a longitudinal project which is carried out in Slovenia every five years (4), further of two investigations of cultural needs or book marketing in Croatia (5) and of several smaller researches in using libraries and in reading in Belgrade (6). As these results were obtained by different methods, they can be compared only conditionally.

How many people read? 38% of the population in Yugoslavia read in 1973 at least one book (43% in Slovenia and 42% in Croatia). In Yugoslavia read 65 % of the population aged 18–24, and 28% aged 55–64. There are 81% of highly educated readers, 20% of craftsmen, 15% of peasants and 14% of unskilled workers.

In *Slovenia* read 52% of the inhabitants more than one book in 1984, what corresponds to the results of some research carried out in Slovenia in 1973. At the end of the seventies this percentage reached even 66%, but it was not retained. One third of them read more than three books. Not a single book was read by 82% of peasants, 62% of unskilled workers, 55% of pensioners, 26% of clerks with secondary education, 8% of those with university qualifications and 4% of pupils and students. Good readers are mostly engaged in culture (50%), education and science (38%), administation (32%), publich health service and social welfare (24%), and at least in crafts (12%), traffic (8%) and agriculture (5%). The younger population and women read more, what earlier investigations have shown. Differences between rural and urban population were considerable. That year (1984) more than three books were read by 44% of urban, 39% of suburban and 23% of rural population. It is interesting that out of 48% of non-readers 45% regularly read newspapers.

Reseach in book marketing in *Croatia* (1983) shows that 45% of the population were constant book readers. Like in Slovenia more constant were readers with university and secondary school education, women and younger people. According to a research in cultural needs of population (1989) reading leads on the list of "cultural activites" (7,8% of respondents) during the spare time, before sports (15%), hobbies (11,8%), going out with friends (10,3%), walks and riding a bicycle (8,7%). In Croatia 66,8% of respondents read daily and weekly newspapers and 17,6% specialized periodicals.

Reading research in *Belgrade* was carried out on a random sample from public libraries and buyers in bookshops, by means of sales agents and advertisements. Understandably, data are extremely unrepresentative of the whole population. There were 85,2% of readers: 35% are occasional, 35,8% constant and 13,6% passionate (read 2 books monthly). The last were mainly students, teachers and employees in cultur and other non-productive branches of the economy. A smaller investigation conducted among the employees in Prijepolje, a small town in Serbia, showed that only 29% of respondents (again on unrepresentative sample) read more than 3 books yearly. Daily and weekly papers were read regularly by 67,3% respondents.

What is read? Among readers in *Slovenia* (52% of population) 45% read only fiction, and 7% only textbooks, popular science and socio-political literature. Especially interesting are values that readers represent. People with a high regard for authority do not read intensively. They are interested in popular science and fiction. The keener readers (primarily of fiction) consider family to be most important. Persons for whom money is the most important thing prefer fiction, are not interested in textbooks and not the least in sociopolitical literature. The authors of the reserach consider that the best Slovene readers are those for whom the highest value is culture, because they read fiction, popular science as well as textbooks and science literature.

Most readers of fiction prefer historical novels (35%), then biographies and novels about war (25%), novels about contemporary life and love novels (23%), whereas the last places are taken by poetry (12%), science fiction (10%) and essays (6%). The majority of readers look in a book for a gripping and complicated story. So researchers conclude that people read to escape from everyday reality to an ideal world.

In *Croatia* 36.3 % of readers read fiction, 22.5% textbooks and science literature, and 9.8% something else. Men read mostly historical novels (20%), and the least memoirs and love novels. Women read mostly love novels (32.5%), then historical novels (17.3%) and the least memoirs and science fiction (2.9%). Young respondents aged 17 to 20 read mostly fiction (54.2%) and respondents aged 41 to 51 (30.3%) textbooks.

Researches in *Belgrade public libraries* show results similar to those represetantive of Slovenia. Readers mostly read historical novels (38.32%), travel-records, memoirs and biographies (36.29%) then social (36.04%) and love novels (34.52%). Poetry (22.34%) and science fiction (19.54%) are read less, even less political literature (15,99%), and the least economy and law (9.39%) as well as natural sciences (8.88%).

How do people acquire books? In *Slovenia* 27% of the population buy books, 11% borrow them in libraries and somewhat less than 11% borrow them from friends. In Croatia 32.4% of the population buy books, whereas 8% borrow them in libraries. In all the polled environments books are bought by people having higher family incomes.

A private library with more than 200 books is owned by 13% of those polled in Slovenia, by 50% in Serbia (unrepresentative sample) and by 20.3% in Croatia (23.1% of respondents in Croatia have a videorecorder). A significant difference between having the private libraries in towns and in villages is stated. In Zagreb no less than 69.2% of the population have privat libraries with more than 200 books.

Slovene reserachers have found out that one of the reasons why a relatively *small percentage of the population borrows books in public libraries* is "the lack of a nearby public library" (those polled in villages account for 80% of such replies). The other reason is that libraries do not acquire enough books that are demanded. Moreover, libraries are defficient in the effective informing about new books. Even constant users learn about new books mostly from their friends, reading a newspaper article or notice them in shopwindows. Library users are chiefly satisfied with library service. This leads to a conclusion that they are not expecting much of libraries.

Causes of the unsatisfying reading culture are certainly manifold and complex. Just some of them have been discussed here incidentally. Taken generally, the South-Slavic nations lagged behind in literacy for historical reasons (with the exception of Slovenes), although reading enclaves developed early. Afterwards social poverty did hinder the development of cultural prerequisities for mass reading. We are fully avare that this explains just a part of the problem.

References

1. The South-Slav countries lived separately under various rulers and influenced by different cultures. Their first common state was formed in 1918 being somewhat smaller than the present-day Yugoslavia. Each researcher of Yugoslav cultural development, and so of reading, will at the very beginning face vast, historically conditioned differences among nations and republics. Neither living in the common state nor changes of political system did not manage to overcome the inherited unequalities. So for example the national income per capita in Yugoslavia is $2.480. The Slovene is twice as much (201,8%). The Croatian income is 128.4% of the Yugoslav average whereas the lowest one have Macedonia ((64.2%) and Kosova (27%).

2. N. A. Rubakin: Psychology of the Public Library, Belgrade, 1941
3. M. Nemajić, J. Janićijević: Book and Reading in Yugoslavia, Belgrade, 1982
4. G. Kocijan: Book and Readers, Ljubljana, 1974; G. Kocijan, M. Žnidaršić: Book and Readers II, Ljubljana, 1980; G. Kocijan et al.: Book and Readers III, Ljubljana, 1985
5. M. Žagar: Book and Market: Master's Thesis, Zagreb, 1983; Research in Cultural Needs of the Population in Croatia, Zagreb, 1989
6. Readers of Belgrade Libraries, Belgrade, 1973; V. Jokanović: Modern Librarian and Reader, Belgrade 1983; From Book to Reader: Research in Literary Communication and Cultural Animation in Belgrade, Belgrade, 1988.

SLOVENIJA
ZAGREB
HRVATSKA
VOJVODINA
NOVI SAD
BOSNA
AND
HERCEGOVINA
BEOGRAD
SARAJEVO
MONTENEGRO
TITOGRAD
KOSOVO
PRISTINA
SKOPJE
MACEDONIA

7-64

YUGOSLAVIA – STATISTICAL DATA CONCERNING READING

	population ca 1987 in-1000	books publ. in 1988	newspap. publ. in 1988	journals publ. in 1988	Public libraries in 1986. no of units	book holdings in-1000	registered users in-1000	books lended in 1986
YUGOSLAVIA	23,411	2,100	2,723	1,719	2,012	28,060	2,312	37,666
BOSNIA AND HERZEGOVINA	4,398	858	315	92	199	3,490	361	5,106
MONTENEGRO	625	347	68	28	20	418	14	301
CROATIA	4,672	2,749	629	453	264	4,219	468	8,869
MACEDONIA	2,065	866	142	86	130	2,386	119	1,777
SLOVENIA	1,937	2,089	485	300	105	4,249	397	6,551
SERBIA	9,714	5,191	1,084	760	1,117	13,298	961	15,062
SERBIA, WITHOUT PROVINCES	5,816	3,883	718	583	650	8,062	627	10,182
PROVINCES: KOSOVO	1,848	360	60	43	173	1,987	92	1,364
VOIVODINA	2,050	948	306	134	294	3,249	241	3,516

The Possibility of comparative Study on Children's and Young People's reading Habits

Jadwiga, Hildegarda Kolodziejska
The Book and Readers Institute of the National Library, Warszawa, Poland

Abstract
This is a tentative assessment of material gathered by means of a questionnaire on children's and young people's reading. Twenty countries have responded with relevant information. The provided data represent a varied form and their comparison poses several difficulties. The article suggests a selection of data and an in-depth analysis. The author recommends writing an extensive article on this topic.

Terms of comparative studies

According to the definition formulated in the Encyclopaedia of Library and Information Science, comparative library science embraces a systematic analysis of development and activity of libraries in each country taking into account historical, political, economic, social, and cultural circumstances.

The inclusion of a broader social context permits to perceive comparative library science as a method analogous to that typical of historical, political, geographical, sociological and other studies.

Various attempts were made to explain the range and content of this encyclopaedic definition. They were first compiled by S. Simsova and M. Mackee in "A Handbook of Comparative Librarianship". All quoted authors emphasize the humanistic value of the method as it favours international cooperation in the field of librarianship and helps to better understand the social processes taking place in each country.

Scholars have known and employed the comparative method for a long time in such fields of knowledge as religion studies, linguistics, literature studies, sociology, psychology, political and economic studies.

Among works which overlap with our interests one ought to mention the book by Jean Hassendorfer "Dévelopment compare des bibliothèques publiques en France, en Grand Bretagne et aux Etats-Unis dans la seconde moitié du XIXe siècle (1850–1914)". By comparing the development of public libraries in Great Britain, the United States and France against the background of historical conditions of social progress in those countries, the author sought an answer to the question why public libraries in France develop so weakly, and why their participation in influencing reading interests is so low. Other works, such as K. C. Harrison's "Libraries in Scandinavia", H.C. Cambell's "Metropolitan Public Library Planning throughout the World", and on Polish ground M. Dembowska's "Documentation and Information Science", B. Świderski's "Cooperation of Libraries in Collections Acquisition", are rather collections of information on selected phenomena (types of libraries, library work) supplied with a broader or narrower commentary.

Thus one ought to determine the necessary conditions for compartive work in the field of readership among children and young people. The preliminary steps include: (a) definition

of the methodological basis, i.e. formulating a question with reference to the examined phenomenon or phenomena,
(b) selection of adequate research tools subordinate to main methodological foundations,
(c) collection of information material according to identifying or differentiating traits of examined phenomena,
(d) selection and definition of adequate terminology.

The above rules of any research procedure indicate that in practice their application requires:
(a) appointing an experienced research group and its head,
(b) permitting free personal contacts for the entire group,
(c) determining the budget covering the costs of monographic work, translations, reviews, study tours, correspondence etc.

These factors must be considered while making a decision on comparative studies.

Assessment of gathered material

The initiative launched by the Round Table on Reading Habits to gather information on children's and young people's reading in various countries may be assessed from the point of view of the initially optimistic assumption or the obtained effects. Firstly, it was naive to maintain that all necessary research conditions enumerated under section 1 could be substituted by the good will of our colleagues (authors of information). Secondly, data relating to countries in question have an incomparable form (they are partly copies of articles published beforehand) and an equally incomparable content. Not to mention the fact that they do not represent any region of the world or group of countries with a similar socio-cultural or civilisational status.

The data were gathered by means of a questionnaire. It included seven main points grouping the following issues: (1) general information, (2) state of eduction, (3) book and other print production, (4) dissemination of print materials, and reading, (5) other media, (6) research on young people's reading, (7) overview and conclusions.

The questions included in the questionnaire were not categorized, they had a rather open character, which of course opened the possibility for providing data at liberty, but also added difficulty to the final description of the obtained material. Until today 20 countries have returned the completed questionnaire. The acquired material is greatly diversified. The only common trait in the formal sense is the time to which the data relate. With few exceptions the supplied information pertains to the years 1987–1988, although there are earlier data dating back to 1959, 1976, 1985, 1986.

The described phenomena may roughly be divided into two groups. The first includes statistical data on publishing, libraries, schools etc. The second embraces the descriptions of reading processes such as the relations between school education and interests in fiction and popular science, relations between psychosocial development of a child and reading interests etc. The statistical data of the first group became out-dated as a result of political and social changes that took place in the countries of Middle and Eastern Europe in 1989–1990. Before our very eyes the monopoly of the state in book production collapsed. Over the past year at least 170 private publishing houses have come to existence in Poland, publishing also books for children. Book prices have risen, principles of public library financing are changing, children's and young people's organizations have disintegrated etc. Many issues referring to reading among children and young people in Poland require a new presentation. This applies also to Hungarian, Czech, Slovak, Bulgarian material. The reading interests of children and young people described in the second group are less suspectible to changes, thus more stable, though also here we have observed a characteristic evolution over the past decades. This pertains primarily to the decline of family traditions to tell farity tales, sing songs, greater

interest in comics, infrequent book purchases or absolute lack of the book at home, increasing difficulties in understanding texts among pupils of elementary and secondary schools, the growing habit to devote most of the leisure time to watching television and video. Those phenomena reflect the state of reading among children and young people better than any statistical data. A mere statement that nearly all children of a given country are subject to compulsory education cannot explain why for instance education programmes do not arouse interest in literature and history. It is essential to learn about the content of those programmes in some depth, as well as the foundations of an entire educational system, especially its organizational structure. In other words it is impossible to judge reading habits among children and young people only in library tems. One ought to go beyond statistical data and reach deeper into the social structure of a country, its historical traditions, political and economic system.

3. What are the possibilities of processing the gathered material?

I could see several options here, which are the following:

(a) Selection of the material and taking into account only those answers which are strictly connected with the questionnaire. This would apply to 15 countries: Poland, Yugoslavia, GDR, Hungary, USSR, Czechoslovakia, Bulgaria, Denmark, Holland, Iceland, Norway, Great Britain, China, USA, France. Some of those countries supplied additional information relating directly to the questionnaire. Seven out of the fifteen enumerated countries went through immense social changes, especially in the field of politics and economy. Excluding China and USA, the remaining six countries belong to the European culture.

Two countries (Turkey and India) have sent papers published beforehand. They bear a loose relation to the questionnaire and the information on young people's reading appears to have been chosen at random. A similar impression is gained from information coming from the FRG and Senegal. Producing general information on reading habits among children and young people from those sources would require many completions and specifications, meaning in practice personal contacts with authors, numerous correspondence etc. Not to mention the costs of translating the entire text into English, providing printing facilities, proofreading etc. (b) Publishing a collection of the obtained information, only if it refers to the questionnaire, meaning a volume of papers, which would require writing them anew according to a detailed instruction. This would necessitate signing contracts with authors, appointing an editor, and making the publication possible.

(c) Preparing an extensive article and publishing it in one of the international library periodicals.

The adoption of one of those options requires time and financial means which are not easily found. Consequently, it seems that the proposal under point (c) is most realistic.

Serial "Librarianship and Bibliography Abroad" within the Professional Library Press System in the USSR

Olga Diakonova, Deputy chief editor of the serial
Olga Timokhina, Editing committee chief of the serial
Lenin State Library, Moscow, USSR

Introduction

The authors are very glad of the opportunity afforded them to speak at the session of the IFLA Round Table of Editors of Library Journals. As the authors work at the Lenin State Library (GBL) they have the opportunity to keep up with the professional library press of the whole world. GBL has a kind of a "library within the library", which holds a rich collection of specialized publications in the field of library science and theory of bibliography (154 thous. items, including over 200 titles of periodicals in the European languages alone).

Current state of professional periodicals in the USSR

Assuming that the audience will find the information on the current state of the library press in the USSR interesting, the authors give a brief characteristic of the publications system dealing with problems of librarianship and bibliography, which covers periodical publications and serials, and primary and secondary source of information. The supplement contains a list of central Soviet journals, year-books concerned with library science, bibliography and informatic and publications which register abstract and review national and foreign library-science literature.

And now a few words about these journals and serials. Among them the most popular are "Librarian", "Soviet Bibliography", "Scientific and Technical Libraries of the USSR", "Soviet Librarianship" and the serial "Librarianship and Bibliography Abroad". Here a substantial specific feature of these publications should be mentioned. Only one of them – the journal "Librarian" is addressed to the broadest community of the country's librarians, mostly from the public libraries. The journal reckons with their major demands and interests. The circle of readers and consequently, the dissemination of the rest of the above-mentioned publications, is narrower. This is connected with their themes and differentiation of information intended for various groups of readers. These publications are, first of all, addressed to research workers, teachers, students of library faculties of universities and institutions of higher learning and to leading specialists of large research libraries. It can, from this standpoint, be asserted that this category of readers is most fully provided with professional periodicals.

However, the specific professional demands of librarians are not reckoned with fully enough. Only one journal – "Scientific and Technical Libraries of the USSR" is intended for librarians of scientific and technical libraries and of STI bodies. Today the librarians of the Soviet Union are establishing library associations and, apparently, with the maturing of these organizations new journals will emerge on the scene.

Serials, which are issued with irregular frequency, expand and supplement the circle of periodical publications. To them belong transactions put out by the leading libraries (for example, by GBL), and collections of transactions (for example, by BAN[1]), the series "Libraries of the USSR Academy of Sciences and the Academies of Sciences of the Union Republics", published by BEN[2].

Furthermore, publications concerned with librarianship and bibliography, are put out by 17 institutes of culture, and by some of the five existing universities and five pedagogical institutes, which have library faculties and departments. For example, since 1956 LGIK[3] publishes the "Transactions" and MGIK[4] the serial "Interdepartmental Collections of research Works."

As regards secondary information on librarianship and bibliography, the bibliographical monthly indexes "Librarianship and Bibliography", jointly published by the Informcentre for culture and art of GBL jointly with VGBIL[5] deserve special mention. Approximately 50 to 60 soviet and foreign periodical publications are indexed in them, as compared to "Library Literature", which indexes over 250 periodicals (a comparison which is no to our credit).

Comparing the "Informatics Abstracts" of the VINITI[5] with its foreign analogues "Library and Information Science Abstracts" (Great Britain) and "Sciences d'information Documentation" (France), we see that it is not inferior to these publications. Annually over 300 periodical publications and serials, put out in 66 languages in 130 countries of the world, are indexed in it.

This system of library periodical publications is supplemented by journals of international organizations, published in the Russian translation: "UNISIST Newsletter. General Information Programme" and "International Forum on Informatics and Documentation" (a quarterly published since 1975). Both publications evoke the interest of Soviet specialists.

Concluding this short outline, we want to note that librarians of the Soviet Union are not fully satisfied with the existing system of periodical publications, it needs to be changed and improved.

Serial "Librarianship and Bibliography Abroad" (BBZR)

In all the domestic publications described above foreign library experience is reflected in one way or another. Articles on the current state of librarianship in foreign countries, information on international conferences and interviews with leading specialists from different countries are published in them. However, it is the serial BBZR, which two years ago marked its 30th anniversary that is wholly given up to problems of librarianship and bibliography abroad. In the period from 1958–1990, 126 issues were put out. Totally 1245 articles by 844 authors, including 805 articles by Soviet authors and 440 articles by foreign authors were published in it. Naturally, these absolute figures cannot fully characterize a publication. In order to give you a better idea about our serial we shall compare it with such authoritative international publications as "IFLA Journal" (IFLA J.) and "International Library review" (ILR) and draw some analogies.

Serial BBZR and ILR

ILR is younger than our serial by 10 years. As it is generally known, it is published quarterly in Great Britain. Recently the authors learned with satisfaction from the letter N. Moore sent to L.F. Kozlova and from "Call to papers. New editorial time" about the changing and perfecting of the activities direction of the ILR editioral board. According to the definition of the new editorial board, "The aim of ILR is to publish high quality critical and analytical articles on matters of library and information services policy throughout the world. Within this overall aim, ILR has established four specific objectives" with which we particularly sympathize. Practically, we worked and continue to work, along similar lines. In contemporary conditions the editorial board of the serial BBZR sees its main objectives in the creation of a system of information support of processes of dissemination and introduction of progressive foreign experience into the practice of Soviet libraries, in the research and theoretical

generalization of the state and contemporary trends of development of librarianship and bibliography abroad.

The staff of the editorial board of our publication has no foreign specialists as opposed to the ILR editorial board, which includes specialists from many countries of the world. However, we aim to build up an international collective of authors (as was mentioned earlier, 411 foreign authors appeared on the pages of our serial). Purposeful and systematic work involved with the commissioning of original materials, which have not been published earlier, expands the collective of authors through the drawing in officials of librarianship, directors and leading specialists of national and large research libraries of the world, young research workers and post-graduate students from different countries studying in Soviet institutes of culture.

As in the ILR, the editorial board of the BBZR aims to acquaint its readers with the state of the art and problems of development of a growing number of countries thus extending the geographical coverage of materials. Of the 61 countries, information on which appeared on the pages of our serial, only in the last few years articles dealing with the librarianship of Angola, Zimbabwe, People's Democratic Republic of Korea, Laos, Madagaskar, the Seychelles, Senegal, Syria, Singapore, Sao Tome and Principe, Sri-Lanka were published. Moreover, priority was given to authors of problem oriented articles on librarianship and bibliography of foreign countries and not to survey materials, though the latter are also represented in the serial.

Unlike the ILR, which had no definite structure designed in advance, our serial aims to lead the reader with the assistance of a flexible system of permanent headings. Until quite recently the editorial staff widely practiced the publication of thematic issues and selection of articles by thematic headings (43 issues and selections were put out in 1958–1989). For example, in recent years special issues devoted to standardization in the field of librarianship, the international comparative study "NB in NATIS", the building and reconstruction of NB buildings, and library service of children, were released.

Parallel with this, the serial for many years had only two permanent sections "International library life" and "Reviews". The traditional structure of the serial became rigid, reflecting an outdated concept of the library world, and was inadequately interconnected with active processes of regeneration and development of librarianship in the age of scientific-technical information. This, as a shortcoming, was marked by many readers. That is why beginning with the 120th issue (1989), the structure and form of presentation of materials were changed and a new system of thematic and genre headings was introduced. Among these new headings are: Library standardization; Familiarization with library organizations; Memorable names; From history of librarianship; Automation of library-bibliographical processes; Libraries of different countries, etc. This form of organization of materials, made it possible to single out the most urgent and prospective problems of librarianship abroad, which are of interest to Soviet specialists, a policy which was approved by readers in their letters.

We think that our serial advantageously differs from the ILR also in that, that each issue not only introduced the authors of the articles, the way it was done in the ILR, in G. Chandler's "Editorial commentary", but provides a summary in E., of all contributions and the translation of the contents into the official languages of IFLA (in E., F., G. and S.).

When preparing this paper and drawing some comparisons with the ILR, we thought feasible and convenient, to include into the subsequent issues of our serial a message-invitation in English with the idea of attracting authors, on the lines of the "Information for Authors" appearing in the ILR.

Serial BBZR and IFLA J.

It would be immodest on the part of the authors to compare their publication with the official international quarterly of IFLA "IFLA J.", the contribution to which might be considered most prestigious. Nonetheless, in the objectives and tasks set for themselves by the editorial boards of "IFLA J." and the serial "BBZR", these two publications are close in their policy of inviting authors contributions. In many things the editorial board of our serial shares the positions of the editorial board of the Journal, which within the 15 years of existence, has made the IFLA J. a publication which is highly regarded by professional librarians throughout the world. The fact that "IFLA J." (in the section preceding the "News section") publishes problem oriented articles and articles dealing with questions of development of library-information processes, is appreciated by readers, who show a permanent interest in it. "IFLA J." has become an important source of information on new phenomena, for example, in information technology.

Comparing the lay-out of the "IFLA J." and our serial, we see, as noted above, that our serial presents summaries, only in E. and not in the four official languages of IFLA (excluding R.) as the "IFLA J." does.

IFLA on the pages of the serial BBZR

In no way seeking to compete with the IFLA J., we want to say that our serial always aimed to acquaint readers with IFLA activities. In different years it frequently published translations of official IFLA documents, articles on its establishment, history, results of 20 sessions and General Conferences (since the USSR became a member of IFLA in 1959), and the activities of different divisions and sections. All in all, in issues 1–126, 69 materials were printed, among them translations of official documents –4; on IFLA General Conferences –23; on pre-session seminars –4; on IFLA core programmes –4; on activities of different IFLA divisions –22; on IFLA history –1; on international organizations (IFLA members) –7; reviews of IFLA publications –4.

Towards IFLA-91

On the threshold of the Moscow IFLA Session (1991), the serial BBZR has embarked upon the path of regular coverage of multi-aspect activities of the IFLA. The editorial board aims to acquaint Soviet specialists with the work of our Federation on a broad and many-sided basis. With this object in view, starting with issue No. 119, a new permanent heading "Towards the 57th IFLA Session (Moscow, 1991)" was opened and has met with the approval of IFLA officials IFLA president: Dr. H.–P.Geh, IFLA Secretary General M.P. Nayta and former Coordinator of professional activities Mr. G. van Wesemael. Under this heading appear articles on IFLA core programmes, and on activities of sections and Round Tables (RT), information and survey materials dealing with regular IFLA sessions, reviews of major IFLA publications, etc.

Wishing to provide Soviet specialists with first-hand information, the editorial board has invited the executives of 27 IFLA units to send their contributions to the serial and officials of 19 sections and RT have already presented their materials. We are sorry to say that not all of them have responded to our appeal. Some Soviet specialists, who participated in professional activities of the IFLA, have also prepared materials dealing with the Federation's structural units, international organizations = IFLA members, and reviews of IFLA publications and periodical publications, for this heading. This section of the serial is approved and supported by readers and it will, undoubtedly, help Soviet specialists, who will participate in the work of the Moscow Session of IFLA and allow the librarians of our country to more

broadly acquaint themselves with the problems with which their colleagues in different countries are faced.

The serial BBZR as a chronicle of international cooperation

From the very beginning of its existence the serial had the heading "Interntional Library Life" and it was only recently that its name was changed and it is now called "International Meetings". The existence of this section reflects the aim to reveal the participation of Soviet specialists in international conferences, sessions and seminars as widely as possible. If we were to take all the publications issued under these headings and align them in chronological order, we would end up with a sort of chronicle of international library cooperation of Soviet librarians.

The serial BBZR as a collective organizer of research of librarianship abroad

Attempts to study the state-of-art and prospects of research of problems of librarianship and library science abroad, made in the 80s in our country brought about a situation, when the serial acquired one more function, which was new to it, that of a collective organiser and coordinator of research in our country of problems of librarianship and bibliography science abroad. Since 1981, the editorial board prepares five-year "Summary medium-term plans of research and information activities in the field librarianship abroad" on an interdepartmental basis. The second "Summary plan... for 1986–1990" covers 161 works by 118 authors, representing 26 large libraries, institutes of culture and other agencies of the Soviet Union (including article for BBZR).

These "Summary plans..." reflect all the "richness" and "poverty" of the state-of-art of research in our country on librarianship and bibliography abroad. On the one hand, they show the urgency of the problems of some studies, and, on the other hand, their chromous breath, multi-theme character, and a strong dependence on the personal interests of the researchers. Without aspiring to regulate the process of research of problems of librarianship abroad, the "Summary plans..", nevertheless, permit the editorial board to be well posted about research projects of different researchers and identify potential authors of contributions for the serial.

Reader feedback

To our thinking, the serial as a research publication, needs constant feedback, cooperation and interaction with readers. With this aim in view, the editorial board regularly organizes discussions of the materials of the serial with readers-specialists. Such discussions took place in Moscow (1970, 1971, 1983, 1989), Leningrad (1970, 1981), Kiev (1971, 1990), Vilnius (1970), and Novosibirsk. One such discussion was held abroad in Sofia in 1974. This form of communication with the readers was supplemented by a questionnaire, which was published in issue No. 109 of the serial. The answers of the respondents provided information on the composition, needs and interests of the readers and allowed us to learn how they assessed our serial. The existence of interest in our serial is borne out by the fact that it was quite frequently reviewed in professional publications of foreign countries.

Reference aids of the serial BBZR

The usage of the serial is facilitated by the Classified index of its contents, put out in 1986. This cumulative index reveals the contents of the first hundred issues of the serial. It is made up of the main (classified) part and auxiliary indexes to it: subject index, index of authors, reviewers and works, entered under the title, and a geographical index. The materials of subsequent sets of ten issues have their own cumulations in indexes, placed in issues No. 111.

and No. 121 of the serial. This arrangement helps specialists to find their bearings in the published information. These indexes also help the BBZR to perform the functions of a Russian "encyclopedia" of librarianship and bibliography abroad.

Conclusion

And so the authors aimed to present a brief survey of the current state of the professional library press in the USSR. We attempted to establish the place of the BBZR within the system of Soviet professional publications in the field of librarianship and draw some analogies with the well-known foreign publications "IFLA J." and "ILR".

The authors thank the officials of the RT for their invitation to participate in this meeting for we think that this exchange of opinion and pooling of experience is extremely important for editors of library journals. One of the authors of this paper, O.Diakonova, was at the outset of the first meeting of library journals editors in UNESCO in 1972. This why the activities of the RT invariably interest us.

In this connection we would like to offer some suggestions for your discussion. We think it would be a good idea to conduct a regular comparative analysis (study) of professional library serials and with this aim in view prepare an appropriate questionnaire and to republish within the "IFLA Publications" series, the guidelines "Library Journals: How to edit them", prepared for the RT by D.H. Borchardt (issued in the series "IFLA Professional Reports") supplementing this material with the most interesting reports delivered at General Conferences.

We also suggest that the RT pay more attention to the exchange of information between editors of journals on such a question as forms of maintenance of communication with readers (questionnaires, discussions, etc).

We also think that a regular exchange of information on the formal aspect of the publications, such as their lay-out, form of presentation of contents, the presence of data on authors and summaries of articles in foreign languages, etc., i.e. on the composition of the reference and auxiliary aids of the publications and their polygraphic makeup, would be useful. Moreover, this is, as we know, envisaged in the Medium-Term Programme for 1986–1991.

In conclusion the authors have the pleasure to invite all the participants of this meeting to Moscow for the 57th IFLA Session of the Council and General Conference, especially as our serial is doing much in the way of preparing Soviet readers for this event.

Notes

1. BAN – Library of the Academy of Sciences in Leningrad
2. BEN – Library of Natural Sciences in Moscow
3. LGIK – Leningrad State Institute of Culture
4. MGIK – Moscow State Institute of Culture
5. VGBIL – All-Union State Library of Foreign Literature
6. VINITI – All-Union Institute of Scientific and Technical Information under the State Committee of the USSR for Science and Technology and the USSR Academy of Sciences.

Central Soviet journals, quarterlies, yearbooks, abstracts and review publications on librarianship and bibliography

Primary sources of information

"Bibliotekar" (Librarian) – a socio-political and scientific and methodological monthly of the USSR Ministry of Culture, All-Union Central Council of Trade Unions and the RSFSR

Ministry of Culture. Founded in September, 1923. Intended for wide sections of librarians.

"Bibliotekovedenie i bibliografia za rubezhom" (Librarianship and Bibliography Abroad) – a quarterly serial published by the GBL. Founded in 1958. Intended for researchers, teachers, post-graduate students, students of library faculties of universities and institutions of higher learning, and personnel of libraries and STI bodies.

"Kniga. Issledovania i materialy" (The Book. Studies and materials) – a serial put out with irregular frequency by the Research-and-Production Association "All-Union Book Chamber". Issues 1–58. 1958–1989.

"Nauchno-teknicheskaja informatsia" (Scientific and Technical Information (S-JJ, Series 1, 2) – a monthly of the VINITI of the USSR. Academy of Sciences. Published since 1961 in two series: Series 1. Organization and methodology of information activities; Series 2. Information processes and systems.

"Nauchno-technicheskie biblioteki SSSR" – (Scientific and Technical Libraries of the USSR) – a monthly serial on questions of theory and practice of librarianship. Founded in 1961. Medium of the State Committee of the USSR for Science and Technology. Intended for workers of research and technical libraries and STI bodies.

"Sovetskaia bibliografia" (Soviet bibliography) – a research and practical journal. Published since 1933. Frequency: 6 issues a year. Put out by all union book chamber.

"Soviet Librarianship" – a scientific serial. Published since 1952. Frequency: 6 issues a year. Put out by the GBL.

Secondary sources of information

"Bibliotechnoje delo i bibliografia" (Librarianship and Bibliography) – a monthly bibliographical index. Published since 1974 jointly with VGBIL in two series: "Librarianship and Bibliography in the USSR" and "Librarianship and Bibliography Abroad". Includes information on new foreign and national publications selected from current acquisitions in GBL and VGBIL. Intended for researchers, teachers, post-graduate students and students. Can be recommended for use in libraries and information agencies.

"Kultura i iskusstvo za rubezhom. Bibliotechnoie delo i bibliografia: express-informacia" (Culture and Art Abroad. Librarianship and Bibliography: Express-information) – a monthly put out by GBL jointly with VGBIL. Published since 1975.

"Referativnyi zhurnal 59 Informatika" (Informatics Abstracts) – a monthly journal of the VINITI of the USSR Academy of Sciences. Published since 1963. Includes abstracts of foreign publications.

"Informatika: express informatsia" (Informatics: Express-information) – an abstracts journal of VINITI of the USSR Academy of Sciences. Published since 1979. Frequency: 4 issues a month (48 issues a year). Contains abstracts of the most topical foreign materials, the contents of which need to be revealed quickly.

The Study Circle Library in a Historical Perspective

Lars Arvidson
Ph.D. Adult Education Research Group, Department of Education and Psychology, Linköping University, Sweden

Abstract
The earlier Prime Minister of Sweden, the late Olof Palme, on one occasion named his country a "study circle democracy". He thereby indicated the important role that adults studies in small groups have played in the democratic development in Sweden and in lifelong learning. Such activites have not only expanded throughout the years but also changed in some respects. During the first decades of the 20th century the library was the centre around which these study activities circled. The study circle can from the beginning be regarded as a way to make the library equally accessible to every one.

This author maintains that the pedagogical ideas behind the manifestation of these study circle libraries are still valid and that public libraries in the future have a great task to fulfil as a resource for adult individuals and groups in their independent pursuit of knowledge.

Background
To be able to appreciate the importance of the study circle library it is necessary to draw attention to what the concept "self-education" signifies. As the term indicates the concept means to educate oneself. However the idea of self-education does not primarily mean individual studies but instead that members of popular movements or other collectives "take knowledge into their own hands" and create their own education. Tradition shows that self-education can take place in many forms, not least in small groups. At the end of the last century, IOGT in Sweden, for instance, gathered inspiration for such small group activities from the Chautauqua movement in the USA.

In Sweden the library very early was viewed as the best means of realizing the idea of self-education. A movement for public libraries was developing in the beginning of the twentieth century. (Swedish General Library Association, still in existence, was formed in 1915). The inspiration for this movement, among others, came from the USA and Britain. Alongside the public library, association libraries and study circle libraries were created.

Circulation libraries represented an outreaching branch of library activity. These were initiated partly by popular education associations, partly by the popular education bureaus at the universities in Lund and Uppsala. The popular education societies consisted of upper class people who eagerly supported the education of the people, whereas interested university teachers took the initiative for the universities' popular education bureau. Apart from the circulation libraries the activity that emanated from these bureaus consisted of popular lectures.

Finally, at the turn of the century, the study circle became, together with library and lecture, a more or less organized form for the practice of self-education. Education in the form of a study circle could be pursued in spite of insufficient economic means and lack of teachers. Thus, it has become the most widely spread form of popular adult education in Sweden.

The study circle library and the social movements

From 1912 government financial support was allocated to two kinds of public libraries, municipal libraries and study circle libraries. This financial support became by the way, the direct reason for founding the Workers' Education Association that same year.

The development of the study circle libraries has a direct relationship with that of the Swedish popular movements. The basis for these libraries was formed by the association libraries, which in turn could be regarded as action oriented institutions.

As they were located in the same places as the association and were kept open during association meetings, they were used by thousands of people who would not otherwise have visited any library. Many people in this way developed an interest for reading books. In addition this interest was strenghtened by the fact that association members were themselves responsible for the library and its care.

The study circles became another pushing force in the same direction:

> An important point in the study circle programme – maybe the most important one – is: "One library in every meeting place!" The task of the associations is to be foci of culture in one way or another and the association members will therefore become better at this work, if they have access to a library. One bookshelf in every association as well as in every home![1]

An essential reason for the popular movements to start building up their own libraries was that the older forms of public libraries, the parish libraries, had too limited collections of books to fulfil the needs of the movements for their membership education. The financial support from the government gave the movements new possibilities to promote their library acitivities. After completing their studies on a subject, the study circles were obliged to return their books to the association library, where these sometimes comprise a special department. Those critical to the government support of study circle libraries stressed that it would be more sensible for all within a community concerned about public reading to join forces and form one single, neutral library association. Besides saving money such an arrangement would also avoid secterist and party politics views on the choice of literature.

According to the defenders of the idea, the disappearance of the small movement libraries would cause irrevocable damage, since the task of these libraries was to spread books to as many people as possible. The municipal libraries did not reach as far as the movement libraries, despite their better resources. It was stated, that in America there had already for a long time been a general understanding that the library had to go to the people, if the people did not go to the library. In Sweden the movement libraries would fulfil that progressive function. In addition, they would in the long run give the municipal libraries a larger audience, when they gradually became too limited for some readers. Thus, even if the movement libraries were comparatively small, their importance was considerable.

> Especially the older libraries have been of great importance in our sparsely populated country, where they many times have served the public with the only good reading they have had access to. And they are all growing book collections, albeit in slow growth.
>
> Most important, though, is that they are going through with the programme, "every association room also a library room", a necessary requirement for the popular associations' character as a cultural institution as well. Not only should there exist municipal libraries, but books should be accessible everywhere where people meet.[2]

The development meant a considerable expansion of the study circle libraries. In 1912 municipal libraries and study circle libraries existed in about equal numbers. Nine years later there were more than two thousand state supported circle libraries and not quite nine hundred

municipal libraries. The number of book loans in the association circle libraries grew from 117.000 to 660.000 per year during the same time.

The library was the centre of popular adult education. The study circle became, as it were, a new and more democratic way of organizing library activities, since its members had influence over the book supply. The study circle was a part of a bigger whole, where the library was in the centre. In 1947 the government support was replaced by a subsidy towards study literature and study leaders. Consequently, the study circle libraries were gradually wound up. Within the WEA, however, a few libraries were in operation until the beginning of the 1970's.

That the study circle libraries disappeared as a phenomenon, does not mean that the ideas behind their first appearance were lost. On the contrary, these ideas might be very interesting in a future "society of knowledge" or "learning society".

The study circle library from a pedagogical point of view

First, it ought to be said that library activities in themselves were regarded as a method of self-education. Special handbooks were published, where practical instructions were given about book purchases, catalogues, book loans etc.[3]

> At least in the country side, taking care of the library is the most important task for the study circle. The present situation is such that the members feel that the libraries are theirs and that care and growth of the libraries are their responsibility, their personal concern.
>
> Further, I mean that this personal interest in the library, which hundreds of thousands of members in popular associations have or will have in connection with the growth of the libraries through their contributions and their sense of responsibility, is a living force, not only in popular education as a whole but also in public library operation, which must not be jeopardized. This personal public interest is of greater importance than the most ideal centralization under the most prominent professional librarians in the most exquisite library organization.[4]

The central position of the library is based on the idea of the book as the most important source of knowledge in popular adult education. According to this idea, one meets "the great teachers of humanity" in all work of fiction – and adult individuals and groups, in pursuit of knowledge, should not settle for less.

> Books and libraries take up a central position in all popular education. It is only natural that such is the case. The book is, no doubt, the foremost means of education, and individual reading one of the most important grounds for all knowledge.
>
> Just like the library is a necessary tool for scientific research, it must also be the foundation for free and voluntary popular education.[5]

The pioneers of the Swedish study circle activities differ in their emphasis of books and libraries, from for instance the founder of the Danish Folk High School, N.F.S. Grundtvig, who regarded "the living word", i.e. the oral presentation and the lecture as the superior method.

From a pedagogical perspective one can apply the following viewpoints concerning the library as a form of popular adult education.

The library facilities free, independent and joint search for knowledge

The study circle in a natural way linked up with the free comradeship and social life which had developed in the regular work within the popular associations. Through the study circles the members established closer links with the association and its meeting programme was, at the same time, raised to a higher level.

> The study circles grew from the beginning with a double task. On one hand, they were to provide means for quenching the actual thirst for knowledge, especially among the young Good templars, on the other hand, they were to gather all Good templars, young and old, in a highly cultivated social life around the fundamental interests in life and society. Precisely the cultural communication was supposed to be the main point in the organization, freely chosen topics for "roundtable discussions", carefully prepared by special openers and at least somewhat reflected upon by all members through reading of literature from the study circle library.[6]

The free discourse in Platon's dialogues with Sokrates as a leader was the pedagogical model for "the father of the study circle", Oskar Olsson, when he presented his ideas at the beginning of the century. The library gave liberty, and at the same time, the organization of permanent groups in the form of study circles gave the book studies some regularity of plan. One could say that the study circle was a method to make library operations more efficient.

The library is an expression of self activity

The most important feature of self-education is initiative. Individuals and groups do not go into pre-produced patterns but decide for themselves about goals, content, methods, and time for their studies. Everyone decides about his task and pursues knowledge independently. Library work agrees well with the basic idea, even if the independent search sometimes is completed with supervision and suggestions about suitable literature.

Books give opportunities for reflection and repetition

Compared to several other methods and media – not least modern mass media – the book gives opportunities to return to the materia for renewed inquiry and analyses. In the library there is also access to alternative literature, which can contribute to studies in depth and to new ideas. It is to be regarded as a loss to the Swedish study circle movement that utilization of the library has diminished. Pre-fabricated study hand books and modern equipment can not, in my view, compensate for the library as a resource in independent search for knowledge.

The book and the library represent continuity

At an early stage, the library became, as stated earlier, the centre of popular adult education. Library activities were coordinated with lectures and courses as well as the study circles. They gave a broad orientation, while the library made a deeper study possible. Through lectures and courses – as well as through mass media – new information of current interest can be communicated. The library in this connection offers continuity and coherence, a necessity to someone who seeks knowledge and not just information.

Concluding remarks

The study circle library was created in a special historical and social context, in close connection with the Swedish popular movements. Experiences from this work, however, indicate the possibilities in the future for the public library to act as a centre for individuals and groups in their pursuit of knowledge in a deeper sense and not only as a centre of information – even if the latter too is to be regarded as an important, if not necessary, task in a democratic society. Such a society needs not only well-informed but also knowledgeable citizens.

[1] Olsson, O. *Studiecirkelbiblioteket och biblioteksskötsel.* Stockholm: Oskar Eklunds bokförlag, 1916, s 9.
[2] Olsson, O. "Till Tjugoårsminnet". *Bokstugan* 1922, s 154.

[3] Olsson, O. *Studiecirkelbibliotek och biblioteksskötsel*. Stockholm: Oskar Eklunds bokförlag. 1916; Nyström, B. *Om läsning och bibliotek*. Stockholm: Svenska Missionsförbundets förlag. 1915

[4] Olsson, O. "Folkbildningskommitténs utlåtande II". *Bokstugan* 1924, s 54 f

[5] Tynell, F. *Folkbiblioteken i Sverige*. Stockholm: P.A. Norstedt & Söners Förlag. 1931, s 148 f

[6] Olsson, O. "Sammanhållning". I *Reformatorn* 1936, nr 43

Referenser

Arvidsson, L. "Popular Education and Educational Ideology". In: Ball, S. & Larsson, S. (ed.). *The Struggle for Democratic Education: Equality and Participation in Sweden*. New York, Philadelphia, London: Falmer Press, 1989

Nyström, B. *Om läsning och bibliotek*. Stockholm: Svenska Missionärsförbundets förlag. 1915

Olsson, O. "Folkbildningskommitténs utlåtande II". *Bokstugan* 1924

Olsson, O. "Sammanhållning". I *Reformatorn* 1936, nr 43

Olsson, O. *Studiecirkelbibliotek och biblioteksskötsel*. Stockholm: Oskar Eklunds bokförlag. 1916

Olsson, O. "Till Tjugoårsminnet". *Bokstugan* 1922

Tynell, F. *Folkbiblioteken i Sverige*. Stockholm: P.A. Norstedt & Söners Förlag. 1931

In Search of the Informed Citizen – Study Circles as Bridges between Libraries and Learning*

Kenneth Abrahamsson
Division of Adult Education, Swedish National Board of Education, Stockholm, Sweden

The individual's knowledge resources – a future question of equal rights

The idea of an enlightened and critical citizenry is nothing new in our time and age. We have an important heritage of ideas from classical scholarly ideals via the thoughts and ideas of the Renaissance and the Enlightenment, continuing on to applied arts and sciences and ending at modern standards of adult and popular education. Seen from an historical aspect, adult education has been an important implement in the development of the democratic process in the Nordic countries. This is the case whether or not we define democracy in a general sense where elected representatives act as proxy for the interests of the majority, or as different forms of direct democracy, consumer influence or the democracy of membership in a popular movement. The advent of folk high schools during the 1860s and the development of study circles at the turn of the century as an added dimension to the role of the library in society are both examples of adult education using the concept of self-education as a guideline. Another interesting phase of this development was the introduction of study circle activities by the various associations to a more general public after the Second World War. These measures were taken, to a large extent, because adult education and learning could serve as a safeguard against political propaganda and authoritarian tendencies.

Making use of the educational ideals and philosophies of the past in a modern situation will, of course, present problems. There are numerous aspects separating modern educational problems from those of years gone by. In the first place, general compulsory education is nowadays the rule, rather than the exception. The youth of today have an education totalling about twelve years. This is around twice as long as was the case only fifty years ago. The Nordic countries have also had an active tradition of adult and popular education within popular movements and organizations. Public libraries, lectures, folk high schools and study circles are implements of education first fashioned and developed during the last century, and in all probability they will be useful far into the twenty first century.

Institutional conditions for creating, retaining and propagating knowledge have developed in a manner in which previous generations could hardly imagine. As cables and satellites have become commonplace, the outer reaches of what is possible to achieve have been transcended many times over. As far as libraries or information centers are concerned, the changes have been particularly radical.

Nowadays it is possible from a small rural Swedish community to use a computer to scan and search for relevant titles and subjects in worldwide databases and to be able to use that gleaned information directly in the computer or have it printed out. This veritable downpour of information – and even other bits and pieces of related facts and knowledge – can be seen as both a threat and a challenge to the informed citizen of today.

* This paper is a short version of a contribution to the IFLA Round Table on Continuing Professional Education, Stockholm, August 20, 1990.

The structures for the development, organization and communication of knowledge reflect power and possession in a more sweepingly than ever before. The possession of knowledge are the assets and wealth of modern society. Those youth and adults who lack necessary educational skills risk becoming second-hand citizens in a social and working environment.

The strong emphasis on equality and justice that were an integral part of the aims of the Swedish educational reforms of the seventies acquires a new validity in the knowledge-oriented society of the nineties. It is not only a question of overcoming the differences between generations. Even as much so it is a question of strengthening other knowledge profiles, of enlarging the borders and enhancing the content of learning at the workplace, of bridging the gap between technology and liberal arts.

Who guarantees the right to knowledge and learning?

On an international plane there is a related discussion concerning *learning rights or the Adult Learner Bill of Rights*. In 1985, the Fourth International Conference on Adult Education which took place in Paris under the auspices of UNESCO, defined the right to learn in the following way:

- read and write
- to question and analyze
- to imagine and create
- to read one's own world and to write history
- to have access to educational resources
- to develop individual and collective skills

This discussion received renewed interest during the international literacy year when the basic skills of young people concerning reading, writing and mathematics are stressed. The rights to learning concern partly *what type of knowledge and education should be guaranteed all citizens* and also *what supportive measures on an institutional basis are needed to realize these objectives.*[1] The concept of literacy is used nowadays in several different contexts, e.g. reading literacy, cultural literacy, workplace literacy, family literacy and information literacy. The issue of adult illiteracy or functional adult illiteracy is a current and relevant policy issue in most western countries, even though the concept is being increasingly questioned in the research community. As an example, President Bush has stated that "by the year 2000 ,every adult American will be literate and possess knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship."

Equal opportunities in a knowledge-oriented society can not be expected to be a result of the level of education an individual has or does not have. A condition that is just as important is the capability and individual has for *self-discipline and self-organization in his studies and quest for knowledge*. The evolution of a learning society with an increased intertwining of different types of learning in, for example formal adult education, popular education, commissioned training programs at the workplace and external studies tends to favor adults with a good basic education, self-confidence and a high degree of self-sufficiency in the furthering of their own studies.

The same line of reasoning can be used about the infrastructure of the knowledge-oriented society – libraries, databases, technical centers, civic halls and popular movements. Even here there is a demand for specific user know-how in order to gain access to necessary information in an efficient manner.

[1] The recent UNESCO declaration from the Jomtien World Conference: *Education for All*, also reflects these objectives.

Self-organized learners will probably be among those who gain most from the new knowledge-oriented society. The losers, on the other hand, will be those individuals who do not have the initiative to learn on their own. Therefore, an important redistributive political instrument is to create positive attitudes to the quest for knowledge and learning among adults with less than positive memories from their school years and with other psychological obstacles. Otherwise there is a risk that we will see a new stratification consisting of those who make efficient use of the opportunities afforded by a massmedial, information-based society in both a private and professional capacity on the one hand and confused on-lookers or dropouts on the other.

Databases – an efficient tool for adult and popular education?

Databases will be discussed here as a pedagogical tool for adult education i.e. a way of making scientific and other knowledge available to the general population, but databases as an administrative aid to library personnel will not be included in this context. The first step is to analyze what level of competency individuals need for information retrieval and what the costs are for gaining access to this information. Databases can be used for a number of various purposes. This in turn brings to the fore different preconditions for learning. Databases can, on the one hand, serve as an aid to compiling references, summaries and other pieces of information about certain subjects and on the other hand be used to provide specific answers to questions by sifting through existing registers and lists, for example in analyzing living conditions in a certain geographical region. There are great pedagogical differences between a more extensive search of reference material and an intensive analysis of a given problem or subject. Databases and libraries are examined here as an integral part of the ideology, historical progression and the modern reality of popular education.

Outline of content

The full version of this paper will comprise:

a) a description and analysis of the new societal context for study circles
b) the utilization of study circles and databases in popular and adult education
c) some concluding remarks on the new challenges of the information society as far as active and knowledge-seeking citizens are concerned

The full version of the paper together with references will be presented at the IFLA Round Table, August 20, 1990.

7–82 getab Stockholm 1990

IFLA GENERAL CONFERENCE STOCKHOLM 1990

Division: Education & Research

Section/RT: Joint Workshop of the Section Education and Training + RT Continuing Professional Education.

120-TRAIN-5(WS)-E
RTCPE-4

NEED AND PRIORITY AREAS FOR CONTINUING EDUCATION FOR SUB AND PROFESSIONAL INFORMATION, LIBRARY AND ARCHIVES PERSONNEL IN TANZANIA

by

Julita Nawe
Head, Training Department
University of Dar es Salaam
Library.

I-R053483

For internal use only:

Meeting No: 203

SI: yes/no

RANK XEROX

NEED AND PRIORITY AREAS FOR CONTINUING EDUCATION FOR SUB AND PROFESSIONAL INFORMATION, LIBRARY AND ARCHIVES PERSONNEL IN TANZANIA

by
J. Nawe

Introduction

Postgraduate training for information, library and archives personnel is done outside Tanzania. This was also the case, till last year, for undergraduate diploma training. This is currently being done within and outside the country. The intake within the country is limited to only 30 candidates per year. The programme aims at providing "basic professional training in library, archive and documentation techniques to middle level personnel for government, parastatal and academic libraries, documentation units and archives."[1]

Another programme run in the country is a certificate course which was started in 1972. Its intake is limited to 40 candidates per year. This programme was started with a view of training Library Technical Assistants in library and information techniques that would enable them to operate efficiently small and medium sized library and information units, select, acquire, and process different types of documents, provide active reader services, and lastly to manage and develop a collection of documents and other media in response to user needs.[2]

Lack of training facilities for postgraduate studies and limited facilities for undergraduate studies has tended, in practice, to babtise training in librarianship terminal. But it is a known fact

RANK XEROX

that no training however thorough is ever terminal (Mmari, 1988:6). It has been noted by professionals (implicitly at a National Workshop on Training of Information Library and Archives Personnel in Tanzania) that this practice, coupled with ever changing technology in the field of information science calls for continuing education of its kind.

The content and mode of provision is dictated by both actual and felt needs of sub and professionals in various categories of institution/organisations as well as the facilities or resources available at individual or group levels. While the content is dictated by information needs, the mode of running programmes is highly influenced by resources available. It is generally realized that training is a must and can in no way be an option at these hard times. This aspect was noted in 1977 by Working Party on Training of the Library Association in Great Britain:

> "Training is not a luxury, an optional extra which can be indulged in only in good times when finance is available and staff are plentiful. In fact, the reverse is true; when times are hard and all resources have to be fully and efficiently used, the need for training is greater than ever. To sacrifice training to short term economies is a failure of vision" (1977:5)

The role played by individuals' constant awareness of what goes around in job performance has been aptly stressed by a number of authors including Okpa-Iroha (1976), Bryant (1985), Cambridge (1976), Edwards (1977) and Prytherch (1986). Edwards (1974:71) clearly stated

RANK XEROX

that "man is a complex animal who needs the stimulus of regular attention and reassurance to keep his/her performing at peak rate and efficiency." This is particularly so for people handling information as information is a key to any kind of development or destruction process. The keyness of libraries/information centres is well summarized by Mwari (1988:1)

> "... anyone with one track mind would fear any place where all sort of information is stored and anyone in love of knowledge would admire and treasure such a centre."

The need for continuing education

In order to keep abreast with new developments and the ever increasing demands from the users of library/documentation centres, continuing education is a must for equiping the personnel with the necessary coping up skills and strategies at both sub-professional and professional levels. It will otherwise be impossible to adhere to professional norms. This is a challenge that has to be faced by any institution that is out for optimization of its services to its patrons. The need whether actual or felt, for this kind of training is reflected in the disatisfaction of the users or the unawareness of the potential users of the services that exist around. The inadequacy of library services is a constant cry of students, especially in institutions of higher learning. This is rather frustrating to the staff who are eager to serve their clientele as well as in maintaining

RANK XEROX

the good name of the profession and the practical justification of its existence. The generality of the public has to be convinced that the services of the library are unique (Obidi, 1975:239). As argued by Mmari (1988:8) the position will improve for the better if and only if the librarians themselves will band together and prove to the Nation that they have serious work to do and that their services are unique. Hence need for continuing education that can cope with the economic realities.

Although the expression of inadequacy is heavily biased towards lack of materials, the role played by inadequate preparation of the staff should not be underestimated. Problems included in this context are related to both staffing, and training in the light of the economic hardships which have hit the services directly and indirectly. Economic realities have already demonstrated a strong impact on staffing and training strategies along the same lines as on provision of materials.

Highlighted areas for continuing education include records management, interlibrary loan, reference work, exchange of materials, public relations for librarians, cataloguing and classification of Africana materials and management of serials.[3] One librarian commented that library work involves a lot of record keeping. In the case of Tanzania most of the record keeping is manually done. The arduousness of the work is obvious. It is therefore apparent that, if confusion and inefficiency are to be avoided, a

RANK XEROX

due attention is paid in making the work of record keeping interesting to the staff; one of the major means being provision of appropriate tools and skills. She believes that record management course in a form of a seminar or workshop would improve record keeping considerably in libraries, documentation centres or archives.

Another area that was felt to be equally important is inter-library loan. It was felt that most librarians in Tanzania do not take inter-library loan work seriously, hence making it frustrating - it takes 3-6 months to borrow books from other libraries, and books borrowed by other libraries on ILL take years to get back to the lending library.[4] While she appreciated that there are other factors such as poor communication/transport system, lack of photocopying facilities etc working against ILL, she felt very strongly that something could be done through some form of continuing education to make ILL operate at a tolerable level.[5]

Public relations for librarians was considered as an important area that could be considered specifically because librarians offer services to the public, hence a great deal of interactions between librarians and library users. Public relations skills may equip librarians with techniques of dealing with various kinds of people who seek library/information services and also those who have a role to play in deciding matters that affect information services. The other five areas mentioned had a lesser emphasis than these three.

RANK XEROX

Mode of provision

The cuts in funds at local level and the ever dropping scholarship figures are forcing heavier application, than has ever been,of non-convential staffing and training strategies. It is no longer possible to stick to long term training plans covering long periods of absence from work premises. Funds are insufficient for sustainance of long term training programmes. The shortage of staff on the other hand exerts pressure on institutions with regard to convential training arrangements. Analysis of the economic realities in relation to facilities available in the country and possibility of sending people abroad for training measured against the national demand for both sub-professionals and professionals indicates that these is a need for having well planned non-conventional continuing education programmes run concurrently with conventional ones. Possibilities suggested in their broad terms include sharing of knowledge in terms of how different institutions/centres handle their problems within the context of an institution and a nation, at a localized level, and in terms that go beyond the national boundaries.[6]

Seminars/workshops and Conferences are some of the highlighted methods for putting these approaches into reality.[7] Other methods include exchange of staff, attachments to institutions and arrangements for well tailored educational visits. These arrangements, are to run concurrently with self-directed education programmes. There is an expressed need for establishing correspondence courses along the lines of other professions like accountancy, education etc to cater for the interest of those who cannot study through full|time programmes.

FUNK XEROX

So for there are two sub-professional programmes - Government Lower and Higher Examination, introduced by Civil Service for its library personnel (for details see appendix 1 and 2). This approach needs extension to other levels if all the personnel are to benefit. A professional association is suggested as an oversee because it is the one that can harmonise the standards.[8] The demand figures for the personnel given below may help to explain the need for multi-approaches. The low annual intake figure can in no way accomodate the national demand for such personnel.

RANK XEROX

Demand for Librarians, Documentalists and Archivists

No. of Unit 1989	Type of Institution	Available Staff 1989	Required Staff 1989	Required Staff 2000
263	Secondary Schools	-	263	500
102	Folk Development Colleges	-	102	150
40	Teachers Training Colleges	-	80	50
2	Universities	34	40	50
196	Research and Training Institutions and other Colleges	13	366	500
60	Government Departments	1	120	150
480	Parastatals (except TIS)	20	960	1,200
14	Tanzania Library Service	40	156	600
1	National Archives of Tanzania	26	30	200
30	Private Organisations	-	20	50
TOTAL		134	2,237	3,450

Source: Tanzania Library Services: A proposal to offer a Diploma in Library, Archives and Documentation Studies at Mantep Bagamoyo, National Central Library, Dar es Salaam, 1989. pg. 4

RANK XEROX

A move towards harmonization of education and training programmes for the three information professions, namely archives, information science and librarianship has already been taken when establishing an undergraduate diploma programme in the field, at Mantep Institute. This is reflected in the courses and also in the recruitment of teachers/tutors from libraries and archives. Teachers are drawn from Tanzania Library Service, the two Universities and the National Archives of Tanzania. And the coverage for harmonization is likely to involve other - non-conventional areas as believed to be traditionally related to information field.

RANK XEROX

FOOTNOTES

1. Tanzania Library Services., A Proposal to Offer a Diploma in Library, Archives and Documentation Studies at MANTEP Institute, Bagamoyo. National Central Library, Dar es Salaam, 1989, pg. 5

2. Tanzania Library Services Board, Library Training Prospectus n.d. pg. 3
3. Various Librarians interviewed in 1990
4. Kiondo, E., A Librarian at the University of Dar es Salaam Library, 1990.

5. Ibid.

6. Various Librarians interviewed in 1990

7. Ibid.

8. Ibid.

RANK XEROX

BIBLIOGRAPHY

1. Bryant, Lynn. A study of non-professional staff training in Cheshire's public libraries, M.A. Dissertation, Loughborough University of Technology, Leicestershire, 1985.

2. Cambridge, D.G. In-service training methods for library staff in London Public libraries, M.A. Thesis, University College London, 1976.

3. Casey, Michael (ed.) Library staff training: proceedings of a conference held on 12-13 July, 1982, Dublin, University College Dublin, 1983 (Dept. of Library and Information Studies, occassional publication 2).

4. Cronin, Blaise and Irene Martin, "Social skills training in librarianship," Journal of Librarianship 15 (2) April, 1983, pp. 105-122.

5. Davinson, D.E. (ed.) Library staff training: the problem of non-professional staff training: the proceedings of a symposium held 30 November, 1976 at Leeds Polytechnic, Leeds: Leeds Polytechnic School of Librarianship, 1977.

6. Edwards, R.J. History and development of in-service training in British libraries, M.A. Thesis, University of Strateclyde, 1974.

7. Edwards, R.J. In-service training in British libraries: Its development and present practice, London: Library Association, 1977.

8. Ilomo, C.S. Current Library Situation in Tanzania. A paper presented at the National Workshop on Training of Information, Library and Archives Personnel in Tanzania, Dar es Salaam 4-6 May, 1988.

9. Mchombu, K.J. The staffing and Training of Barefoot Librarians and Tutors in Tanzania, Paper presented at SCECSAL VII, Gaborone, 4-8th August, 1986.

10. Mmari, G.R.V. Education and training of a Professional in a developing country. A paper presented at the National Workshop on Training of Information, Library and Archives Personnel in Tanzania, Dar es Salaam, 4-6 May, 1988.

11. Obidi, Sam. "Towards the Professionalization of Teaching in Africa "West African Journal of Education Vol. XIX, no. 2 June 1975, pp. 239-246.

BOOK XEROX

12. Okpa-Iroha, Mwokocha. In-service training provision for non-professional staff in public libraries in Nigeria, M.A. Dissertation, Loughborough University of Technology, Leicestershire, 1976.

13. Saunders, W.L. Curriculum Development: The Core-Common Trunk or Satellites, Paper presented at IFLA Conference, London, 10-14 August, 1987.

14. Sollenberger, J.K. In-service training, American Library Association, 1964.

15. Tanzania Library Services Board, Library Training Prospectus n.d.

16. Tanzania Library Services, A proposal to offer a Diploma in Library, Archives and Documentation Studies at Mantep Institute, Bagamoyo. National Central Library, Dar es Salaam, 1989.

17. Thompson, James. Introduction to University library administration, London; Clive Bingley, 1970.

18. Wells, Michael. Staff training in University libraries: Final report for the period June 1982 - February, 1983 (Report to the British Library Research and Development Dept. on Project.

19. Working Party on Training. Training in libraries, London: The Library Association, 1977.

20. Discussions with various people.

RANK XEROX

Appendix 1

Government Lower Standard Library Examination Content

Module 1: Library Administration and Procedures

(a) The place of libraries in society

(b) Types of libraries: Their - Central, Finance and Organization

(c) Library cooperation

(d) Library departments

(e) Circulation of Library materials - to include: registration of members; charging systems; overdues and renewals; reservations and suggestions

(f) Library statistics

(g) The development of library services in East Africa with particular reference to Tanzania.

(h) Library accommodation (Including Building or room, Furnitures, Internal arrangement and Security)

(j) Reader - staff relations

(k) Orientation courses on how to use libraries

(i) Reference services.

Module 2: Acquisition and Processing of Documents

(a) Preservation of Library materials

(b) Stocktaking, weeding and withdrawals

(c) Types and storage of library materials

(d) Methods and procedures of acquisition

(e) Selection methods and tools

(f) Workflow in processing documents

(g) Theft and mutilation of documents.

Module 3: Cataloguing

(a) Introduction to cataloguing i.e. - what is a catalogue and what are its uses; - kinds of library catalogues.

(b) Elements of a catalogue entry

(c) Cataloguing rules

(d) Forms of catalogues and arrangement of entries

(e) Practical cataloguing

Module 4: Classification

(a) Introduction to classification

- What is classification
- Reasons for classifying library materials

(b) Features of Dewey Decimal classification scheme

(c) Features of U.D.C. Scheme

(d) Methods and problems of arranging library materials

(e) Introduction to chain indexing

(f) Practical classification

FRANK XEROX

Government Higher Standard Library Examination Content

Module 1: Library Management and Administration

(a) The role of Libraries and Documentation centers in society

(b) Types of Information Units

(c) Library and Information policy

(d) Library Planning

(e) Library Manpower Development

(f) Supervision, Delegation and Worker's participation in Libraries

(g) Finance and budget control in Libraries

(h) Public relations and Lobbying Technique

(i) Motivation and Library scheme of service

(j) Departmentalization in Libraries

(k) Library objectives and Evaluation

(l) Library Cooperation (Resource sharing)

(m) Problems of Library Development in Tanzania.

Module 2: Information Resources Development

(a) Range and types of Library materials

(b) Selection of Library materials

(c) Methods of acquiring materials

(d) Acquiring of foreign literature

(e) The Problems of the publishing Industry in Tanzania

(f) Government publications

(g) Collection development.

Module 3: Dissemination of Information (Reader service)

(a) Identification of users and their information needs

(b) User behaviour in seeking information

(c) User education and Instruction

(d) Types of Information services

(e) Factors which influence the use of recorded information

Module 4: Information Retrieval

(a) Organization of document treatment and processing

(b) Centralized processing of Library materials

(c) Analysis of Information

(d) Indexing methods and Abstracting techniques

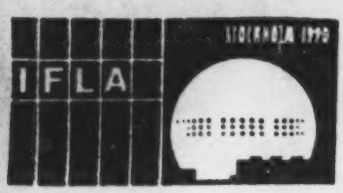
(e) Strength and limitations of Information retrieval systems

(f) Establishing and managing Library catalogues/Indexes

(g) Stocktaking and stock revision

RANK XEROX

IFLA GENERAL CONFERENCE STOCKHOLM 1990



Division: Education & Research

~~Section~~/RT: Joint Workshop of the Section Education and Training + RT Continuing Professional Education

121-TRAIN-6 (WS)-E
RTCPE-5

THE CONTINUUM OF LIBRARY EDUCATION: MAINTAINING COMPETENCE THROUGH THE PROFESSIONAL WORKLIFE

Darlene E. Weingand, Ph.D.
Associate Professor and Director of Continuing Education Services
School of Library and Information Studies
University of Wisconsin-Madison, USA

IR053483

For internal use only:

Meeting No: 203

SI: ~~yes~~/no

THE CONTINUUM OF LIBRARY EDUCATION: MAINTAINING COMPETENCE THROUGH THE PROFESSIONAL WORKLIFE

Darlene E. Weingand, Ph.D.
Associate Professor and Director of Continuing Education Services
School of Library and Information Studies
University of Wisconsin-Madison, USA

With reference to the suggested topic, "The relationship between initial professional education and continuing education, demands from professionals, dilemmas for educators..." the issue appears to lie not in a tension or adversarial relationship between preservice and continuing education, but in the two words: demands and dilemmas. Why is this true? Two paradigms are operating here and must be acknowledged before any substantive remedy can be undertaken. These paradigms are:

- The need of professionals to cope with a rapidly changing world and work environment, building upon their formal training but also realizing that much more is required. Stresses occur between management and staff over issues of released time and tuition reimbursement. Stresses occur between employers and educators over what is taught in terms of both content and practical application.

- The need [and desire] of library educators to cope with the this changing profession from theoretical and research perspectives and to make adjustments in formal course work to reflect their perceptions of a shifting reality in the workplace. Stresses occur between educators and institutional expectations for tenure and promotion. Stresses occur between educators and employers over issues of theory vs. practice.

In today's world, and reflected in information services, the impact of change and technological development is staggering. The rapidity of movement of these two forces is steadily increasing and maintaining professional currency becomes more and more challenging. Occupational obsolescence is now a very real concern in all fields of work, but it is particularly critical in the information industry, for it is information and its patterns of access which are accelerating at the fastest rate.

How can the professional librarian effectively and responsibly perform in such a shifting and ambiguous workplace? How can standards of competence and excellence be maintained at the highest possible level? How can personal self-worth in the professional role be nurtured in the midst of this psychologically demanding world? How can employers be assured that the professionals they hire are competent--and stay competent? How can educators stretch already limited time to reach out beyond the preservice degree? And then...who shall provide? and who shall pay? This paper will discuss the importance of viewing professional library education as a continuum and how the responsibility for this continuum must be accepted by individuals, organizations and governments if the profession is to become a key player in the information industry.

THE CONTINUUM OF PROFESSIONAL EDUCATION

In order to meet the challenges posed by the shifting sands of a changing world, it is important to view professional education in the context of a continuum. This continuum extends from early preparation in schools of higher education to the opposite pole of continuing education. In the real world, library education has moved through an evolutionary process at both the preservice and continuing education poles of the

continuum and strives to reflect the rapidly changing nature of a society which spins on twin axes of rapid change and developing technologies. As the information society becomes more highly developed, the need for competent information professionals grows apace. Over time, the demands of the profession have correspondingly intensified until today when the horizons of professional librarianship seem almost limitless.

The image of a continuum is important to effectively coping with a changing profession. Whereas preservice education initiates the continuum, continuing education of various types perpetuates it. Professional education must encompass a continuum of equal or greater length than the totality of the work life if the quality of that work life is to rate between satisfactory and excellent on both personal and organizational performance scales.

When this continuum is either breached or inadequately maintained, a decline in performance quality and increased stress and burnout generally result. Professional proficiency can burn out or become obsolete due to a variety of individual and situational changes, changes which are both cause and effect vis-a-vis personal attitudes and experiences produced through shifts in societal, career or organizational expectations.[1]

The resultant obsolescence can be defined as less than optimal proficiency for current professional performance. An optimal level is generally based on implicit standards of effective practice as reflected in occupational expectations, demands and constraints which are or have been expressed by opinion leaders in work settings, professional associations, educational institutions and regulatory organizations--the sum of which constitutes the current state of the art.[2] Any performance level not consistent with this state of the art can be regarded as tottering on the brink of obsolescence, at least in part.

For many years, popular belief held that the professional degree would suffice for the average length of the work life. This belief was probably not true then, and it is certainly a shortsighted and erroneous position to hold today. According to the assistant director of general library services at the University of Illinois at Urbana-Champaign, "The rate of change in information technology and its impact on libraries make it important for the recent graduate to realize that much of what was learned in professional school will soon be obsolescent."[3]

The reality of today--and through a series of projected tomorrows--is that continuing professional education is a necessity, a mandate for engaging in a professional role. As a necessity, and as the mode of education affecting the largest proportion of the work life, continuing professional education assumes its rightful place as the majority stockholder on the continuum of professional education. It needs to be acknowledged that over the total work life continuing education will command more hours of involvement than the original preservice degree. With this perspective firmly in place, it is time to examine more closely the nature of continuing professional education and its place in professional development.

CONTINUING PROFESSIONAL EDUCATION AND PROFESSIONAL DEVELOPMENT

The continuum of library education contains a range of possibilities which move along the professional education continuum and are directly related to perceptions of how adults learn, the professional role and available educational formats. Malcolm S. Knowles has proposed that adults learn differently than children and has suggested that the term "andragogy" be used to describe these differences. Specifically, Knowles identifies the following traits as attributes of the adult learner:

- Adults have a deep psychological need to be generally self-directing.
- As people grow and develop they accumulate an increasing reservoir of experience that becomes an increasingly rich resource for learning...[and] attach more meaning to learning they gain from experience than those they acquire passively.
- People become ready to learn something when they experience a need to learn it in order to cope more satisfyingly with real-life tasks or problems.
- Adults want to be able to apply whatever knowledge and skill they gain today to living more effectively tomorrow. Accordingly, learning experiences should be organized around competency-development categories.[4]

When this self-directed, experience-oriented and problem-solving adult becomes involved in a professional role, connections need to be made between the individual and the role. Houle has proposed five characteristics of professionalization:

- Clarifying the defining function or functions: the mission
- Mastery of theoretical knowledge: the information and theory that form the knowledge base
- Capacity to solve problems: the application of theoretical knowledge and practical experiential wisdom
- Use of practical knowledge: that body of knowledge that has grown out of the nature, history, scope and processes of practical application
- Self-enhancement: new personal dimensions of knowledge, skill and sensitivity by the arduous study of topics not directly related to the occupation[5]

Preservice education is primarily aimed at the second characteristic (theoretical knowledge) and, to some extent, the first characteristic (the mission). However, the remaining characteristics are dimensions of the merging of theory, practice, and experience. The gap between preservice education and mature, optimal professionalism must be bridged by what can be defined as continuing professional education. Continuing education in library and information studies has the important mission of somehow coordinating the adult professional's various formal and informal learning experiences, accepting the assumption that the adult is a self-directed, self-motivated, problem-solving learner. Educational opportunities must be generated that assist librarians in enhancing the above-cited characteristics of professionalism and in nurturing personal growth and expanded expertise. This is no small task--but it is critical to individuals, organizations and the profession at large.[6]

What kinds of educational opportunities are available along this continuum of professional education? Delivery systems can range from formal classes to self-directed study, including such options as short courses and workshops, attendance at conferences, teaching and writing, and professional reading. The concept of format extends to mediated instruction through the use of video and audio courses, correspondence courses, and interactive telecommunications. The difficulties posed by geographical isolation significantly diminish as education is increasingly provided at a distance. In addition, technological developments will continue to enrich this mix with new opportunities to respond to the needs generated by the rapid rate of change.

While this broad spectrum of formats provides a host of potential educational opportunities, the ultimate responsibility lies with the individual to determine individual and organizational needs and select activities which will meet those needs. As self-directed, problem-solving human beings with a host of individual differences, information professionals must select learning content and formats that correspond to their unique set of circumstances. The final decisions as to format, topic and frequency are personal ones, but they must rest on both the desire for choice and the recognition of ultimate responsibility.

What is the ideal scenario? If the self-directed view of the adult is accepted, then self-monitoring of competence, with the assistance of regular job evaluations and self-assessment, is the appropriate goal. One of the real benefits in self-assessment and personal goal-setting is the opportunity to examine a wider range of impinging factors than is normally considered by more structured evaluative agencies or procedures--and a range in which the implications are unique to the individual. Such self-assessment will include technical competence, but it will also factor in societal and technological change and personal life style and attitudes. This self-analysis should complement well the current movement toward competence assessment.

COMPETENCE ASSESSMENT AND DEVELOPMENT

The issue of competence, mentioned earlier by Knowles, is appearing more and more in the literature as the drive for accountability intensifies. As the finite pot of available dollars is called upon to support an expanded universe of services, how those dollars are spent becomes an increasingly visible and popular issue. Since librarianship is a staff-intensive profession, the majority of any budget is devoted to staff costs. It therefore becomes increasingly necessary for both administrative and effectiveness purposes that staff competence be maintained at a high level.

Several studies have addressed the notion of individual competence. A two-part series in Public Libraries highlighted potential competencies of public library directors in terms of administrative, clinical and professional knowledge, skills and attitudes.[7] Building upon this beginning, a joint United States-Canadian study took place in 1983-84 which used the administrative competencies to assess public library directors in communities serving populations of over 100,000.[8] In addition, King Research was commissioned to conduct a research study on competence identification in library and information science education.[9] These studies illustrate a growing concern with individual performance as it is related to the needs of a changing society.

However, competence cannot be chiseled in stone. New knowledge and skills are bursting upon the scene as the information industry continually creates and demands knowledge of new paths to access and bibliographic control. The fluid nature of the information industry requires that knowledge, skills and attitudes flow with the current of social change and technological development. If competences in librarianship were to be regarded as fixed, the flow would be constricted and librarianship would be left behind as the information industry surges toward the sea of innovation and change.

It is therefore incumbent upon each information professional to continually use self-assessment techniques to determine personal levels of competence and present and potential gaps in individual performance. Such an assessment can utilize some of the models cited above as resource guides; the important consideration is that some mechanism be developed and that appropriate continuing education activities be identified for present and future participation.

WHO SHALL PROVIDE? WHO SHALL PAY?

These two questions are key to many of the tensions that occur along the continuum. Is it the responsibility of library schools to provide the whole of the continuum or a part? What roles do professional associations and vendors have in continuing professional education? What responsibility does the employing institution have in providing inservice education, and where does it lie on the continuum? How does the individual's professional obligation to maintain competence fit in?

alike; both are directly involved, and someone must pay if the education experience is to occur. There are, of course, several models of payment: 1) by the employer; 2) by the student; 3) by a scholarship/grant given by an association, school, library system, etc. and 4) through government support.[12]

By the Employer.....There are many institutions which regard continuing education as an integral component of human resource development and good personnel practice. Such forward-looking organizations are eager for their employees to be up-to-the-mninute in their knowledge and skills and use staff development as an effective tool in this fine tuning of the work force. However, not all organizations are this enlightened and employees are faced with an organizational attitude that is non-supportive. There is, however, a middle ground, in which the employer contributes the time to engage in continuing education but not funding. It is imperative that employer interest and support, on whatever level is locally feasible, be encouraged.

By the Student/Participant.....While it is true that each person is responsible for their own continuing education, the economic capacity to do so varies widely and for some, quality continuing education is simply unaffordable. To leave the financial responsibility solely at the student's door may eventually create competence "haves and have-nots."

Tuition Assisted by Scholarship/Grant.....Financial aid can be provided by organizations such as library systems, professional associations, and universities/colleges. This aid is as (or more) valuable to the continuing education student as to the undergraduate or graduate student.

Government Support.....In many countries, education is provided without cost to the student; in others, cost is a student responsibility. Yet, even in those countries where the cost of education is the burden of the student, there is government support; but it is at the undergraduate and graduate levels where the majority of governmental support is directed. As stated earlier, the continuing education student is at least as deserving, if not more so, since more of the life span is affected.

These are issues worth discussion and serious consideration on the part of information professionals. The importance of continuing professional education cannot be stressed too strongly. But, in addition, the quality of such education is equally critical to competent practice and also needs to be considered.

The Issue of Quality

Regardless of provider and method of payment, the importance of quality must also be emphasized. While the length limitations of this paper preclude extensive discussion of quality, the reader is directed to the "Guidelines for Quality in Continuing Education for Information, Library and Media Personnel" prepared by the Continuing Education Subcommittee of the Standing Committee on Library Education (SCOLE) of the American Library Association (ALA) and available from the publications office of the ALA.

SUMMARY

The questions and issues discussed above help to highlight and place in perspective the relationship between preservice and continuing professional education in the context of a continuum. However, intrinsic to the discussion are two assumptions: the premise of continued competence and the determination to engage in appropriate continuing education experiences along the continuum of professional library education. The continuum of education for professional librarians needs the acknowledgment, the support and the commitment of individuals, organizations and associations, and government. The arguments presented revolve around a certainty: continuing professional education is an imperative for competent professional practice. The seeds of tomorrow are indeed sowed in the activities of today; professional success depends upon total involvement in the continuum of professional library education.

Notes

1. Darlene E. Weingand, The Organic Public Library (Littleton, CO: Libraries Unlimited, Inc., 1984), p. 77.

2. Alan B. Knox, "The Nature and Causes of Professional Obsolescence," in The Evaluation of Continuing Education for Professionals: A Systems View, edited by Preston P. LeBreton et al. (Seattle: University of Washington, 1979), p. 133.

3. Paula D. Watson, quoted in "Launching a Successful Career in Academe: 32 Administrators and Professors Offer Advice," The Chronicle of Higher Education (September 4, 1985), pp. 42-44.

4. Malcolm S. Knowles. The Modern Practice of Adult Education (Chicago: Association Press, 1980), pp. 43-44.

5. Cyril O. Houle, Continuing Learning in the Professions (San Francisco, CA: Jossey-Bass, 1980), pp. 35, 40-49.

6. Darlene E. Weingand, "Continuing Education Programs and Activities," in Education for Professional Librarians, edited by Herbert S. White (White Plains, NY: Knowledge Industries Publications, Inc., 1986), p. 226.

7. Darlene E. Weingand, "Competencies for Public Librarians: A Beginning," Public Libraries 10 no. 4 (Winter 1981), pp. 104-106 and "Librarians' Personal Continuing Education Planning," Public Libraries 21 no. 1 (Spring 1982), pp. 13-16.

8. Darlene E. Weingand and Noel Ryan, "Managerial Competencies and Skills," Journal of Library Administration 6 no. 1 (Spring 1985), pp. 23-44.

9. José-Marie Griffiths and Donald W. King. New Directions in Library and Information Science Education (White Plains, NY: Knowledge Industries Publications, Inc. and the American Society for Information Science, 1986).

10. Darlene E. Weingand, "Continuing Education," Journal of Education for Library and Information Science 25:4(Spring 1985), p. 325.

11. Darlene E. Weingand, "The M.L.S.—Only the Beginning," Journal of Education for Library and Information Science 26:4(Spring 1986), p. 294.

12. Darlene E. Weingand, "Who Shall/Should Pay?" Journal of Education for Library and Information Science 25:3(Winter 1985), pp. 223-225.

IFLA GENERAL CONFERENCE STOCKHOLM 1990

Division: Education + Research

~~Section~~/RT: Joint Workshop of the Section Education and Training + RT Continuing Professional Education

122 - TRAIN-7 (WS)+ RTCPE-6

CONTINUING EDUCATION:

AN AUSTRALIAN PERSPECTIVE

BY

Fay Nicholson
Chairperson, Board of Education,
Australian Library and Information Association

Executive Officer, Graduate Diploma in
Library and Information Studies,
Institute of Education,
The University of Melbourne,
Parkville, Victoria, Australia

and

Angela Bridgland
Chairperson, Library and Information
Studies Division,
Institute of Education,
The University of Melbourne,
Parkville, Victoria, Australia

IR053483

Keywords:

Australia - continuing education programs
Australia - continuing education providers
Australia - library schools
Australia - professional associations

For internal use only:

Meeting No: 203

SI: yes/no

ABSTRACT

This paper examines the following continuing education issues from the Australian perspective:

1. Challenges and priorities for the next decade. Studies of experienced practitioners and recent graduates indicate the following priorities: advanced management studies, technology updates, in-depth study in specialisms, marketing and lobbying, preservation and conservation, and information provision for special groups.

2. Overview of current providers.
   These include library educators, libraries and information agencies, system vendors, book trade/publishers, consultants, professional associations and their special interest groups.

3. Problems experienced by practitioners.
   These include cost, physical access, time release, inappropriate offerings, lack of employer support and recognition, competition with colleagues.

4. Examples of Australian initiatives.
   Federal government industrial agreements requiring employers to invest in continuing education; Australian Library and Information Association self-paced accredited packages, development of a database for all continuing education activities and courses in each state; tailored in-depth courses.

INTRODUCTION

For the purpose of this paper we have adopted Elizabeth Stone's (1969) definition of continuing education as being

> "... all activities and efforts by librarians to upgrade their knowledge in their field of work or specialisations so that they can become more effective professionals and be able to handle responsibilities of greater scope and accountability."

There is no question that a first professional qualification in librarianship is inadequate to sustain graduates throughout their working careers. Social and technological change render knowledge and skills obtained at point of entry to the profession obsolete at an increasingly rapid pace. Continuing education (CE) is a way of extending initial education and upgrading professional skills and knowledge.

1. IDENTIFICATION OF THE CONTINUING EDUCATION CHALLENGES AND PRIORITIES IN AUSTRALIA FOR THE NEXT DECADE.

1.1 Challenges

There are a number of readily identifiable challenges pertaining to CE for information professionals in Australia at the moment. Among these are the:

* increasing complexity and competitiveness in the workplace;
* need to constantly upgrade in specialist areas;
* requirement for improved management expertise;
* lack of expansion within organisations and the ensuring difficulty of learning on the job;
* having to do more with less;
* need for librarians to compete with other information professionals;
* image of librarians - the need for librarians expertise to be credible both to the community and to their employers;
* necessity to improve access to continuing professional development;
* quality of service.

In a paper she gave at the 6th Biennial Australian Medical Librarians Conference, Joanna Richardson adds a further series of challenges to the above list.

> "Developments such as the increasing variety of formats in which information is available, the expanding dependence on automated systems, the shifting nature of library clientele, and the demand for library managers with the skills to cope with the growing size and complexities of libraries and library networks have combined to pressure library and information personnel to update and expand their knowledge and skills."

In addition, there is also a desire among librarians to establish coordinating mechanisms for CE programs in Australia. We have nothing which compares with CLENE (the national Continuing Education Library Education Network) or FLEXIS (the Federal Library Extension Instructional System) in the United States. We have partial coordination through the Australian Library and Information Association or ALIA (formerly the Library Association of Australia) and its various sections, but, despite urging members to identify their CE needs at the local level, there is still a widespread feeling that programmes develop in an unrelated, adhoc way.

1.2 Priorities

1.2.1 Surveys

A number of studies have been undertaken over the last decade in Australia to determine the continuing education needs of various groups of librarians. For example, McIntyre (1982) investigated the CE needs of librarians working in the state of Victoria, Richardson and Cook (1985) proposed a model for ascertaining CE needs of regional librarians and Broadbent and Grosser (1986) looked at the continuing professional development needs of special librarians. Our library school also carried out two surveys in 1989, one of our graduates and the other of professional associations/groups to determine what areas of professional education were deemed important to offer at higher degrees level.

1.2.2 Findings

Results from all surveys, irrespective of type of librarian or geographical location, demonstrated a perceived CE need for two broad areas, namely, library automation/technology and advanced management studies. In areas of CE needs, therefore, Australian library and information professionals do not differ from their British (Bird, 1985) or American counterparts (Durrance 1986), (Neal, 1980).

2. PROVIDERS OF CONTINUING EDUCATION IN AUSTRALIA

The challenge of provision for individuals and for organisations is taken up by a range of providers.

2.1 Library schools

Opportunities for professional development through higher degrees is being increasingly provided. Our own surveys indicated that librarians and various professional groups such as sections of the Australian Library and Information Association (ALIA), the Australian Database Development Association, the School Library Association of Victoria etc., not only wanted the areas identified as priorities to be offered as CE activities, but as fields of study at an advanced level in higher degrees programmes as well. (In Australia, as in the UK, the standard first professional qualification is a Graduate Diploma, not an MLS as in the USA and Canada). Other areas of study seen as priorities for higher degrees in Australia were:

* in-depth studies in specialisms such as advanced information retrieval skills;
* specific management topics such as marketing and lobbying, planning, personnel and financial management;
* information provision for special groups such as Aborigines, the elderly or handicapped;
* preservation and conservation.

Many schools contract to provide continuing education for libraries, for professional associations, and offer venues for system trainers. In addition, individual lecturers contribute to seminars, conferences, and meetings. A further feature has been continuing education offered by Alumni. For example, in Melbourne, the Monash Graduate School of Librarianship hosts a one day seminar each year on a range of topical subjects.

However, the first commitment of library schools is to current students. Further for individual lecturers, any contribution to CE is over and above their commitment to teaching, and an activity for which little recognition is made within the faculty.

2.2 Libraries and Information Agencies

Libraries and information agencies respond to challenges at a range of levels. Many large organisations conduct formal induction training as an immediate extension of initial education for beginning librarians. Some large libraries deliberately plan CE programs. For example, in Victoria the State Library offers for tender several programs for their staff, both professional and para professional on topics (1990) such as "Speaking Out" and "Time Management", and the public library sector has developed an extensive training program on performance measurement.

Many organisations support staff in acquiring professional qualifications or higher degrees with study leave, or support attendance at conferences or courses such as those offered by the Australian Information Management Association (AIMA). For some organisations these responses are built on staff appraisal and deliberate staff development programs.

Some libraries provide training for their own and other professionals. For example, the National Library of Australia has been active in training for systems such as the Australian Bibliographic Network.

2.3 Professional Associations

At the national level, professional associations such as ALIA and the Australian School Library Association (ASLA), offer biennial conferences, journals and seminars on particular issues. Further, ALIA assists approved initiatives with recoupable grants to enable planning and development.

At the state level, the state and regional branches offer seminars, meetings and newsletters which cater for issues of interest to that particular region. These seminars may be in response to local demand or to a topical subject, such as Literacy in 1990. A further level is that of sections and special interest groups who offer continuing education in meetings, seminars, publications relating to particular specialisms, such as cataloguing, acquisition, library education. Another major contribution of associations is publicity, for example the Australia-wide list of coming events in <u>In Cite</u>, ALIA's fortnightly newsletter.

In terms of formal CE activities, until recently ALIA asked its Divisions to identify priority CE areas and seek national funds for those activities they could not develop and implement themselves or for which they required some investment of risk funds. These activities were then put out to tender. In the past, successful tenderers included ALIA Divisions themselves, library schools, large libraries which have their own training infrastructure, management consultancy companies, freelancers and consortia - a health range of CE providers. However, due to financial constraints, ALIA can no longer administer the tendering system and put up seed monies.

Now the various CE providers approach ALIA directly if they wish to mount an "approved activity" for CE. These proposals are vetted by ALIA's Board of Education and, if approved, are given free publicity. If the program makes a profit, 5% of this is returned to ALIA. All losses, however, are borne by the provider. It is difficult though for the Board of Education to ensure a balanced range of offerings at the moment as it tends to react to proposals rather than initiate them. Hopefully this situation is about to change in the near future, as will be detailed later in this paper.

2.4 Other Agencies

Apart from ALIA and ASLA and their state branches, Australian librarians are fortunate to have a range of bodies offering stimulating professional development activities. Among the most active are:

* the Australian Council of Library and Information Services - ACLIS. This body has as its members library and information agencies rather than individuals and it operates at a policy and planning level. Issues which it addresses for CE are those which affect the profession nationally, such as copyright, document delivery, conspectus, etc.;

* the Victorian Association of Library Automation - VALA - which offers monthly activities for its Victorian members and mounts a national conference biennially.

There are numerous other agencies - the National Book Council of Australia, The Australian Children's Book Council, large employers such as the National Library and state education departments, and consultants. Research groups, too, such as the recently established Centre for International Research on Communication and Information Technologies - CIRCIT - hold regular seminars and workshops on topics relevant to the profession.

Many librarians attend courses in related areas at institutions such as The Council of Adult Education and the Technical and Further Education Colleges. Examples are courses in computing, keyboarding, assertiveness, accounting and marketing.

2.5 Vendors

Library suppliers and automated system and product vendors also provide CE opportunities. Although their activities are obviously designed to promote their outputs, they supply an essential avenue of updating and training in a cost effective way, not only in their offering being the only viable way that staff can acquire training, but also in enabling the training of trainers. Examples are Dialog's training of online searchers, where seminars and workshops are prepared in response to users' expressed and perceived needs, and planned in regard to pacing, level and content.

2.6 Consultants

Some consultants operate continuing education seminars, e.g. Free Lance Library and Information Services - Marketing the Librarian - while AIMA conducts courses in management for middle and senior managers and is about to commence a series of courses for beginning librarians on organisational structure and behaviour.

3. AUSTRALIAN RESPONSES TO CONTINUING EDUCATION PROBLEMS.

3.1 Characteristics of library and information studies

Knowledge of librarianship grows primarily from practice as new products and methods are demanded and introduced, rather than from extension of the theoretical base of the profession. Most librarians become aware of a need by word-of-mouth, journal articles, conferences. This information is gained in a totally ad hoc manner. The impact of technology, at all levels - basic, specialized and advanced, e.g. expert systems, CD-ROM and software packages has stimulated increased attention to the acquisition of skills through CE. The characteristics of library students - mostly from humanities backgrounds - has tended to direct attention to certain areas of CE, rather than to the acquisition of quantitative skills and management techniques.

As indicated above, various groups have responded to needs, but in an uncoordinated manner. The Education for Library and Information Services Section, Victorian Group, of ALIA is currently developing a database of all CE activities offered in Victoria by all providers. It is planned that this database will be updated regularly, that access will be available through a number of outlets, such as library schools and major libraries. This database will enable managers to ascertain if a suitable course is being offered, and to plan CE more effectively for their staff. For providers the record will assist in planning for future courses, and hopefully result in more deliberate and coordinated offerings. It is proposed to offer the software to other states at a later date.

Although special interest groups provide specialist training to a range of users either in a specialist field, e.g. law, or in a specialist skill area, e.g. cataloguing, services to disadvantaged and handicapped users, the increasing number of graduates who are employed in information areas <u>outside</u> libraries, will pose difficulties for effective targeting of CE activities as their needs become more diverse.

3.2 Course offerings

Not all librarians are experienced teachers, and course design may be poor, lacking in relevance and quality. Few are adept at training adults, or in providing appropriate learning situations and techniques. On the whole there has been little attempt to evaluate courses, or to provide competency-based CE. The result is that individuals and organisations may be hesitant in trusting the sponsor. However, this is changing as library schools become more involved in CE and programs such as AIMA's "Train the trainer" gain popularity.

A further problem is the level and length of courses, which may be open to both professionals and para professionals. If the aim is to maintain or gain competence, to what extent can this be achieved in a once off session? If the goal is to develop professional skill, a wide range of topics is necessary to cover the diversity of the profession. This is being addressed in part by ALIA's self-paced packages and by broadening the range of CE providers.

Format of CE is often attendance at conferences, seminars or meetings held in main cities. Physical access to CE is a major problem in Australia in both urban and country areas. However an ALIA reponse is the planned biennial conference in 1992 to be held in a major regional city to ensure involvement of country members.

In Queensland, the School Library Association has overcome the problem of distance by using teleconference facilities to enable school librarians from remote places to join in CE activities, or to meet formally on matters such as cooperative curriculum planning and teaching.

The content of courses is a significant issue for individuals. If courses are taken to increase individual satisfaction, they must be tailor made for that individual's need. If they are taken to gain exposure to new ideas, the course must be related to the individuals work or potential. For the individual, a major problem is time as most courses involve absence from the workplace and opportunity cost is a major issue.

To attempt to overcome some of these problems, a new initiative in CE has been taken by the Board of Education of ALIA. Although the concept of self-paced packages is by no means novel, several factors have prompted the Board of Education to undertake this project in earnest. Among the catalysts are:

* a growing desire by professionals to have access to CE on their own terms - for example to be able to study in their own time and at their own convenience;
* the need to offer CE in a variety of modes;
* a mounting impatience with the lack of coordination of current offerings - members of ALIA want to have the option of being able to undertake an interlocking series of activities and to have their achievements professionally recognised by the Association.

To this end, the Board of Education has identified four areas of need and has invited a range of information providers to develop self-paced packages, which include an element of assessment. Members wishing to have their studies formally recognised by ALIA would have to successfully complete the assessment component. The initial topics to be developed in this way are:

* making the most of your teleconference;
* choosing a system to automate a small library;
* how to approach AACR2;
* promoting library services to minority groups.

3.3 External Factors

Approval from an authority greatly assists the development of CE programs, but government support at times is unclear, uncertain and limited.

In Australia industrial awards are being redrafted on a Structural Efficiency Principle (SEP) which includes:

* establishing skill-related career paths which provide an incentive for workers to continue to participate in skill formation;
* eliminate impediments to multi-skilling and broadening the range of tasks that a worker may be required to perform;
* creating appropriate relativities between different categories of workers within an award and at enterprise level.

The basis is the changing nature of skill which through broadbanding of classifications and multi-skilling renders obsolete traditional craft boundaries and the notion of job ownership. Multi-skilling is training in a number of formerly discrete skills which enables an employee to perform a wider range of tasks.

This more highly skilled workforce will require substantial changes in the provision of training. Award restructuring recognises that entry skills are not good enough by themselves. There must be increased emphasis on re-skilling and continuing education. It will be necessary to identify both the need for training and the mechanisms. All levels of staff will be involved.

The Australian Federal Government has indicated its intention to bring in a training guarantee. All organisations with a payroll of over $200,000 will have to spend 1% of their pay on training. If the money is not spent then an equivalent amount will be collected and given over to a training body such as an Industry Training Council. This figure of 1% will increase in future years.

Training may be paid training leave, CE courses or modules, (building block credits) which would add up to a recognised qualification, or level of achievement. The use of this modular approach will give access to training for those who find formal courses unsuitable.

3.4 Management Factors

Much CE is in-house, informal, flexible, and voluntary, based on needs as perceived by individuals, rather than planned and coordinated. Some managers do not encourage professional growth, provide release time, registration or reimbursement, counselling, or the opportunity to share and apply the information gained through CE activities. Some managers' attitudes to CE are negative, neutral, skeptical or qualified with resultant effects on individuals and the organisation. Some managers undertake inadequate, if any, needs assessment linked to staff appraisal where a meaningful link is required to ensure effectiveness of CE.

3.5 Finance

Limited funds are often quoted as an argument to justify and reinforce unenthusiastic attitudes to CE. Financial resources may also be scarce for any but the most central or urgent activities and services.

Cost of CE services is a major problem. Cost of higher degrees is an issue for individuals as there is no guarantee of return in the form of promotion or higher salary. Further, the cost of courses/conferences and the necessary travel over long distances is an issue for a profession with a middle to low range of income. Opportunity cost is a real consideration for individuals and organisations - the time and money expended has to be worth the effort.

CONCLUSION

CE providers in Australia acknowledge these challenges and problems discussed above. They are committed to improving the range and quality of their offerings and are sensitive to their target audience's training needs, and are offering a wider range of higher degrees and short courses of a practical nature in response.

The current trend in our profession is to increasingly value CE as an ongoing professional commitment and Australian initiatives reflect this thrust.

REFERENCES

Bird, Jean (1985) In-service training in public library authorities. British Library R & D Report 5898, Library Association Research Publication 23. London : The Library Association.

Broadbent, Marianne and Grosser, Kerry (1987) "Continuing professional development of special library and information centre managers." Journal of education for library and information science. 28 (2), p.99-115.

Durrance, Jean (1986) "Library schools and continuing professional education : the defacto role and factors that influence it." Library trends. 34 (4), p.691.

McIntyre, Barry (1982) "An investigation into the continuing education needs of librarians employed in Victoria." Masters thesis. Melbourne : Monash University.

Neal, James (1980) "Continuing education : attitudes and experiences of the academic librarian." College and research libraries. 41, p.128-33.

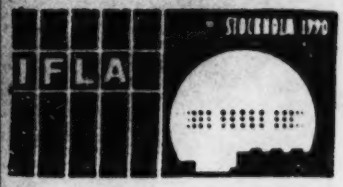
Richardson, Joanna (1985) "Continuing library education." 6th Biennial Australian Medical Librarians' Conference : Medical libraries - new directions. Sydney : Library Association of Australia, Medical Libraries Section, p.69.

Richardson, Joanna and Cook, Brian (1985) "A proposed model for ascertaining regional needs of library and information science workers for continuing education." Australian library journal. 34 (2), p.15-22.

Stone, Elizabeth (1969) Factors related to the professional development of librarians. Metuchen, N.J. : Scarecrow, p.21.

AB/FN:JB/98
May 1990

IFLA GENERAL CONFERENCE STOCKHOLM 1990



Division: Education & Research

~~Section~~/RT: Joint Workshop of the Section Education & Training + RT Continuing Professional Education

123- TRAIN-8 / RTCPE-6 (WS)-E

IFLA Section on Education and Training

Distance Education in Library and Information Science Education

by

Fred W. Roper

ABSTRACT

The paper describes the distance education program currently underway at the University of South Carolina, with emphasis on television delivery of courses. Plans are presented for a new distance education consortium for schools of library and information science.

IR053 483

or internal use only:
eeting No: 203
I: yes/no

IFLA Section on Education and Training

Distance Education in Library and Information Science Education

by

Fred W. Roper

I'm pleased to have the opportunity to share with you the distance education experiences of the University of South Carolina's College of Library and Information Science, and to tell you about some plans underway to form a national consortium for delivery of library and information science education. Since 1976, the College has been actively involved in a distance education program utilizing both television delivery of courses and off-campus offerings at selected sites around the state. By and large, our efforts are primarily directed toward graduate degree-seeking students.

In order to understand the characteristics of this particular program of distance education, it is necessary to understand the institutional environment in which the program takes place. The University of South Carolina consists of nine campuses: five 2-year campuses, three 4-year campuses, and the flagship campus in Columbia. The Columbia campus is the home of all graduate programs sponsored by the University, including our College which began instruction in 1972. The College offers the only American Library Association accredited master's degree program in South Carolina plus a specialist degree. We have about 300 students in our two programs.

Graduate distance education at USC can potentially take three forms: Traditional off-campus teaching, 2-way live interactive television, and open broadcast non-interactive television. The College is presently participating in all 3 types of offerings

Distance education at USC is greatly facilitated and encouraged by the

central administration. All forms are administered by one unit within the University: the office of the Chancellor for University Campuses and Continuing Education. Without the support services of that office, the College would have encountered serious difficulties in mounting its program. We are greatly indebted to them and to the University's commitment to providing graduate educational programs outside Columbia.

Off-campus teaching involves travel to another location to offer a regular College course, and we have been doing this since 1976. At USC there are 2 major factors which facilitate the offering of off-campus courses. First, the Chancellor's office operates a program called Graduate Regional studies. Each of the non-Columbia campuses has a resident director of graduate regional studies. This individual works with the College in assessing need and demand for a course and then makes local arrangements for the registration of students and arranges classroom space. Another factor is geography. Columbia is located in the center of the state with no site being more than 2 1/2 hours away. The College normally offers 2 or 3 off-campus courses each semester.

The second distance education option available at USC is graduate-level courses through live interactive closed-circuit television. This method uses satellite and telephone lines to broadcast live classroom instruction from the Columbia campus to approximately 20 locations throughout South Carolina. As the students are viewing the course, they have the capability of talking with the instructor to make a comment or ask a question by using a telephone at the site that is instantly connected to the studio. Both question and answer are heard at each site in the system. On at least three occasions during the semester all the students in the course are required to meet in Columbia for in-person instruction or testing.

A variation of this method involves a combination of pre-taping for use with the live telecast. In this manner, material that doesn't change very much, such as some units in the research methods course, can be taped and used more than once, either by the same instructor or by another instructor. Case in point: our former Assistant Dean is now the Associate Provost of the University. We continue as his faculty home, and he is going to teach our research methods class on TV this summer. In order to accommodate his schedule, we have decided that he will not do a full live course. This semester he completed taping of certain portions of the course. These portions will be broadcast at the time of the class for a portion of the time, and John will appear live for the rest of the session. The opportunity for interaction will be there, but the delivery will not be in what we at USC have come to consider our traditional mode of delivering a course. And the beauty of it is that the recorded portions which have been carefully chosen can be used by John again or by another instructor.

A variation of this is our plan to tape our technical services instructor presenting certain components of our basic technical services course for another instructor to use in a live class in the fall semester. In that instance, the second instructor becomes the facilitator, answerer of questions, initiator of assignments, grader, etc.

Two support centers at USC facilitate our delivery of courses through TV: the Instructional Services Center and the Office of Telecommunications Instruction. ISC provides the technical expertise including studios and the full range of production and consultation services needed for telecommunications delivery. The Office of Telecommunications Instructions promotes the courses and provides logistical support, including registration, mailing of textbooks and syllabi, photoduplication, and toll-

free telephone access to faculty by students. In addition, that office provides faculty with counseling in instructional design and media utilization.

The University has had many years of experience using this format. The Colleges of Business Administration and Engineering entered this arena in the late 1960's. In addition to those colleges, the Colleges of Health, Social Work, Education, and Nursing, along with our College, are the primary users of the closed-circuit TV system which has some 6,000 enrollments per year. As you might expect, there is considerable competition among the colleges for airtime, and this is increasing. Because we ultimately are transmitted through the ETV station in South Carolina, we also face competition from other institutions, most notably Clemson University.

The third component of the distance education program at USC is the use of open-circuit TV which involves the general broadcast of taped instruction to all parts of South Carolina via educational TV. That is, the student can take the course while sitting at home. In this time of general availability of VCR's, students may tape segments which are aired at inconvenient times for their schedules. Alternatively, the Office of Telecommunications Instruction can provide the student with all tapes for the course for use at his or her convenience. These students are also required to come to Columbia for three sessions of in-person instruction or testing.

To date the College has used this format primarily for courses aimed at non-major undergraduates or persons seeking re-certification credit. One course has been developed in the college specifically for this mode: Jump Over the Moon: Sharing Literature With Children. We are seeking funding for others.

In the spring of 1982, the College first offered Jump Over the Moon, using open-circuit television. In the fall of 1982, the College offered the course in Foundations of Information Sources and Services, using interactive television. These were the first courses in what has since become a regular, indeed the major, part of the College's response to the distant learner in South Carolina.

The decisions to enter the arena of TV delivery of courses were not made lightly and without some cost to the faculty. It should be noted, however, that the College was founded on the basis of innovation in education and has enjoyed a generally open-minded and risk-taking faculty. Thus the notions of trying something which seemed at that point to that faculty fairly radical was not a great issue. The major concern of the faculty was the same as for any new course or other innovation--making sure that the intellectual and academic integrity be maintained.

The TV courses have been carefully monitored, and studies have been conducted to determine their effectiveness. The bottom line is that comparisons of TV courses and students involved in them with the same courses offered on campus have shown no statistically significant differences among the variables selected for study.

Every course offered via telecommunications is treated the same as courses taught in the traditional classroom--the same syllabi, assignments, grading procedures, requirements, and end-of-term evaluations are used with each course. Students are also required to come to Columbia for three intensive, live Saturday sessions.

Both required and elective courses have been offered using interactive television, including: basic reference, research methods, selection of non-book media, administration, collection development, introduction to

bibliographic control, adult materials, and records management. We are now looking into the feasibility of offering certain courses at a limited number of the sites that would have the appropriate resources for the courses, i.e., computer courses and specialized resource courses, such as health sciences literature.

By 1986, when I became Dean, the College had a wide-ranging distance education program that had become an integral part of the College's activities. What seemed to be needed, however, was a policy on how these efforts would be carried out. A Distance Education Task Force was appointed early in 1987 and its report reaffirmed the College's commitment to distance education and put into place a policy that involved all of the faculty in distance education. Beginning with the 1988 academic year, we have published a five-year plan of courses we intend to offer in Columbia, or to take to other sites, or to broadcast over TV. This schedule is intended to provide our students with the information they need to plan for their own academic programs, recognizing that changes have to be made, as faculty and College needs change.

Implicit in the development of the five year plan were the following:

(1) participation of all faculty;

(2) all distance education courses would be taught within load;

(3) each faculty member would offer one course per academic year in the distance education program and the remainder of his/her courses on campus, with TV and off-campus assignments alternating.

The distance education program is not without problems and frustrations to faculty and students alike:

(1) Not all courses lend themselves to delivery away from campus--either by TV or on-site offering; some can be offered only at

selected sites which have needed facilities. For example, computer courses need access to adequate laboratory facilities.

(2) Taking a course off-campus usually involves the loss of a full day by faculty who must travel to a remote site, conduct class, have local office hours, and return to Columbia.

(3) Enrollments in the TV courses have reached large numbers, and extra assistance must be provided to faculty. In the spring semester of 1988, I offered the same course that was the College's initial entry into closed-circuit interactive TV and had 156 students at 20 sites in the state. Yes, the Dean participates in this program, too. How could I expect the faculty to continue a commitment to an activity that I didn't participate in? That participation has given me a greater understanding of the problems, frustrations, joys, and satisfaction that our faculty experience in TV teaching.

(4) Students still have to visit Columbia or other centers of population for resources not available elsewhere. We take the <u>class</u>, not the course, to them.

(5) Advising has become more cumbersome. In 1988 we implemented a regional advisory system in which the faculty go to sites for a day of advisement each semester. All faculty participate, and the entire state is covered. Guess who got Hilton Head!

On the positive side, the College's overall enrollment has increased dramatically -- both in and off campus. Since the first TV courses were offered in 1982, the number of credit hours generated by the College has increased 133%. At the same time that we have seen a dramatic increase in off-campus credit hours, there has been a significant increase in full-time

students on the Columbia campus.

What of the future? We intend to look for ways of making our program more effective. Providing more development assistance to faculty in course preparation and graduate assistance to execute the course will strengthen our offerings. Refining and reviewing our five year schedule will be an ongoing activity. Providing more on-site assistance to TV students in the form of facilitators or discussion leaders at each site is under study. Review of all our courses to determine which courses completely or in part lend themselves to TV production is imperative. Seeking new ways of providing courses at a distance is underway. One possibility is the use of audio with computers to cover areas that don't necessarily need video. Creative packaging of parts of courses with a lesser amount of interactive closed-circuit TV time may help in our quest for more TV time in order to mount more courses.

What do I see as being the primary factors in the success our College has enjoyed in its distance education program? First and foremost is commitment -- form the top down, and commitment is alive and well at USC! A second factor is evidence that the integrity of the program is being maintained regardless of the medium of instruction. Third is support and cooperation from all units. The undergirding of all this, of course, is adequate resources. But no matter how wonderful your resources and facilities, the program won't be a success unless everyone is convinced that this is the right route to follow. As you would expect some of our faculty are more enthusiastic than others. They all, however, support the program, recognize the benefits it has provided the College, and see this program as being a major contributor to carrying out the College's mission. This has had an interesting effect on our recruitment of new faculty, and we spend considerable time with candidates making certain that they are

comfortable with our mode of operation.

For about a year and a half, a group of library schools has been talking about nation-wide cooperative distance education efforts in library and information science. We are working with Jones Intercable Co. of Colorado. The instigators or co-conspirators in this initial effort were Clarion State, Emporia State, South Florida, and South Carolina.

All library schools have been invited to participate in developing this program, and already there have been positive expressions of interest and support from other schools. In June the organization of LISDEC, the Library and Information Science Distance Education Consortium, will be completed, and agreements will be signed.

We see two major benefits. The first is providing access to graduate degree programs in library and information science to people who otherwise would not have this opportunity. The other is a sharing of resources from one school to another. As you know, programs of library and information science are traditionally relatively small in the overall scheme of things. If my students can have access to a specialization from another school, our program is greatly enhanced. Related to this is the possibility of taking advantage of courses needed by our own students but not offered on our campus in a given semester or academic year. It is the latter two possibilities that I find particularly appealing--the possibility of expanding our course offerings.

Inherent in all of this is the need for the individual school to maintain complete autonomy over its program:

What courses provided by other schools should and would and could be accepted in a student's program?

How much of a student's program could be accepted away from the campus?

How would individual schools use the courses, i.e., let the student enroll in the course as offered by another institution or would the school use it as that school's own course with some live interaction wrapped around the canned course?

The list goes on--and the answers will vary according to the needs of each program.

The consortium idea in distance education utilizing television delivery is not new. A very successful model already exists in the form of the National Technological University, a consortium of schools of engineering. LISDEC is based on that model with some very important modifications. First and foremost, LISDEC will not be a degree-granting agency as is NTU. Each student will be affiliated with a program and will be subject to the rules and regulations of that institution.

Some institutions may be interested in using TV for both degree-seeking and non-degree seeking students. Others may restrict the use to non-degree. Still others may see it as a way of providing continuing education.

Membership in LISDEC certainly will not be limited to those schools with programs accredited by ALA. In our discussions to date, we have had representatives of ALA, MLA, and SLA participating in our planning. We hope that they and other associations will continue to work with us. I believe that we have a unique opportunity to affect all aspects of professional education--from entry-level degree programs to meeting continuing education needs.

When I was interviewing for the deanship at USC in 1985, 2 of the persons I was scheduled to meet with were the director of the Instructional Services Center and the director of the Offfice of Telecommunications Instruction. It seemed a little strange to me, but why not? I had

received some background about the TV program at USC which was really getting into high gear about that time. One of the questions addressed to me was whether I would be interested in teaching in the TV program. Quite frankly I wasn't sure I wanted to. However, it didn't take long for me to appreciate how important the TV program at USC has been to our program and to our state. The director of the Office of Telecommunications Instruction frequently chides me about my initial reaction to TV--and now a considerable amount of my time is spent in working on this aspect of our program.

We do recognize that TV is not the answer to all our problems. It isn't always suitable for a course. It isn't always suitable for a faculty member. It does raise questions about faculty load. There are sometimes problems about resources at various sites, including facilitators and mentors and books and hardware and software. It causes us to rethink some of our basic teaching philosophies. It is a challenge.

On the positive side, it makes it possible for us to reach bright, eager students who otherwise might not enter the program. It probably causes us to be more structured and organized in our presentations. It should make us more keenly aware of the need for ongoing curriculum revision.

There is a world of possibilities associated with TV, and participation in the Consortium--whether as a producer or as a user--will give each school the opportunity to control its own use of the medium at whatever level the school believes to be in the best interests of its constituencies and programs. The greater the participation, the easier it will be for us to turn the challenges that arise into opportunities. It seems particularly appropriate that we are moving ahead with these plans in

the last decade of the century--an opportunity for us to be on the cutting edge of technology as we approach the 21st century.

I am grateful for this opportunity to share with you our experiences. If you have questions, I'll be glad to try to answer them. Thanks for your attention.

IFLA

Workshop: Education and Training with CPE - "New Challenges"

154 TRAIN-11 / RTCPE-9 (WS)-E

Börje Holmberg

OPEN AND DISTANCE LEARNING IN CONTINUING EDUCATION

IR053483

For internal use only:

Meeting No: 203

: yes/no

Börje Holmberg

OPEN AND DISTANCE LEARNING IN CONTINUING EDUCATION

Concepts

Teaching and learning by correspondence is the origin of what is today called distance education. Correspondence education has been known for several generations, mainly as part of adult education. References to what was probably correspondence education occur as early as the 1720s and to what was indisputably correspondence education in the 1830s (Battenberg 1971 p. 44, Bratt 1977 p. 161, Holmberg 1986 pp. 7 - 7). Correspondence education is taken to denote teaching in writing, by means of so-called self-instructional texts, combined with communication in writing, i.e. correspondence between students and tutors. There are thus two constituent elements of correspondence education, the teaching exposition and the non-contiguous communication, for both of which a supporting organisation is responsible.[1]

As, for both of these elements, media other than the written word became common and grew in importance, the term correspondence eduction was felt by many to be too narrow. In North America, independent study (cf. Wedemeyer 1981) and home study (cf. Lambert 1983) have been used as competing terms. The same applies to external study in Australia and New Zealand, hence the name of the Australian and South Pacific External Studies Association. Since the early 1970s, distance education is the designation that has gradually been adopted in the United Kingdom (though resisted by the Association of British Correspondence Colleges), in North America, Australia, New Zealand and other parts of the English-speaking world, as well as internationally. A degree of formal recognition of the term distance education occurred in 1982 when

1 The term 'supporting organisation' for the school, university or other body in charge has been adopted from Delling, who rejects the term 'teaching' in connection with distance education (Delling 1966 and later).

the Unesco-affiliated International Council for Correspondence Education (ICCE) changed its name into the *International Council for Distance Education (ICDE)*.

The adjective 'open' commonly occurs in connection with distance education, no doubt because of the strong influence of the British Open University and other distance-teaching organisations that have adopted practices corresponding to and names containing this adjective. In these names 'open' refers to access and to the avoidance of avoidable restrictions.

> Open learning is a state of mind. It is an approach taken to the planning, design, preparation and presentation of courses by educators, and an approach taken to the selection and use of learning strategies and associated resources by students. This approach seeks to provide students with as much choice and control as possible over content and learning strategies.
>
> (Foks 1987 p. 76).

Thorpe & Grugeon 1987 p. 2 describe open learning as 'an umbrella term which refers to a whole series of varied educational initiatives and provision'.

In today's usage the distinction between distance nd open learning is blurred, however. In the interest of clarity I adopt Foks' definition of open learning as quoted above and use the following of distance education:

> Distance education covers the various forms of study at all levels which are not under the continuous, immèdiate supervision of tutors present with their students in lecture rooms or on the same premises but which, nevertheless, benefit from the planning, guidance and teaching of a supporting organisation. Distance study denotes the activity of the students, distance teaching that of the tutorial organisation, particularly its authors and tutors.

Continuous education is taken to mean teaching and learning taken up after basic eduction or degree studies have once been finished. One application is further study by trained librarians.

It is distance eduction as serving open learning in continuing education that is my theme. For a detailed conceptual analysis see Holmberg 1989a.

The practice of distance education

Teaching and learning in distance education are with few exceptions based on two constituent elements: a pre-produced course[2] and non-contiguous communication between students and tutors.

The pre-produced courses used in distance education are, or are meant to be, of a self-instructional type. They are usually in print and often supplemented by recorded audio presentations. Sometimes broadcast programmes (radio and/or television), video recordings, viewdata/teletex and other supplementary media are used. Pre-produced courses may be self-contained or may function as guides to the study of set or suggested texts, recordings etc. They are usually divided into units, at the end of which students are invited to answer (and ask) questions, compute, translate, solve problems, write essays, etc. and to submit this work for correction and comment. Tasks for submission to the supporting organisation are usually referred to as assignments.

The role of the second constituent element, non-contiguous communication (by which, of course, is meant two-way traffic), whether in writing, on the telephone, on audio tape, by computer, or in any other way, varies in distance-eduction systems. In some it is the basic element, in others it is partly or even largely

2 Distance education is possible and does occasionally occur without the support of pre-produced courses. A tutor, with whom the student is in non-contiguous contact, then guides the individual student's study of pre-agreed literature.

replaced by self-checking exercises and/or face-to-face sessions.[3] Between these extremes there are various intermediary positions, acknowledging face-to-face interaction as a subsidiary procedure. For instance, on the one hand, the British Open University, though catering for complete non-contiguous two-way communication, systematically organises face-to-face contacts in study centres and during summer corses; on the other hand, many private distance-teaching organisations in Europe, the USA, and elsewhere, offer two-way communication mainly by non-contiguous means but make occasional use of face-to-face sessions.

Techniques and applications of media conducive to individual learning have been developed and tried out. There can be no doubt that distance education is normally highly effective in helping students to attain prescribed or recommended aims. Distance teaching may then mean 'teacher centred education, where the media are used as substitutes for the teacher, "telling" students what they ought to know' (Ljoså 1977 p. 79).[4] Cf. Marland & Store (1982) who query the propriety of the exclusive application of one particular approach to teaching through text. 'This approach incorporates use of devices which have been derived from, or can be readily aligned with, a traditional approach to teaching in which, typically, specific goals are defined for students; content and resources are presented by the teacher; interactive processes and patterns are largely initiated, guided, and controlled by the teacher; obligatory assessment activities are set by the teacher; and feedback is provided by the teacher. These devices are considered by Macdonald-Ross (1979) to be the "cultural descendants" of tightly structured programmed learning materials. Clearly they signal an approach to distance teaching which is heavily teacher-directed and which casts the teacher in the roles of manipulator, controller, and director' (Marland & Store 1982 p. 73).

3 Thus the Dutch Open Universiteit makes no provision for non-contiguous communication based on assignments.

4 Cf. Cross 1976 p. 107: 'Mastery of subject matter is not the ultimate goal of all education'.

Let us look into this, which to my mind is a seriously misguided use of distance teaching in continuing education.

Most distance-education courses with their various components aim at leading their students straight to specific goals and do so on condition that the students are capable of following the exposition, doing the exercises, and solving the problems set. The course developers then tend to regard each study unit as an integral part and thus as a compulsory course component which is only rarely regarded as replaceable. The most common exception to this principle is no doubt an adaptation of the starting point to suit the prior knowledge of individual students.

This all-embracing course structure is often too rigid. Students should - whenever possible - be offered a choice of which units of a course are to be regarded as relevant in each case. Such an approach leads to each unit or each small set of units being separate and providing sufficient treatment of a limited, and strictly defined, part of the subject. When that is the case, students can build their own curricula from units or sets of units belonging to different courses. This is what in German is called the 'Baukasten-Prinzip', the principle of the box of bricks.

One advantage of this principle is that each study unit or set of units can be used in different contexts. This is economical and can contribute to widening the offer of educational opportunities. Further, it makes provision for requirements to study only one little part of a subject (and possibly acquiring a certificate; through a credit-point system, this can be tantamount to securing what may be regarded as a mortgage on a degree or other formal competence) (Ljoså & Sandvold 1983).

The modular principle would seem to have another consequence of considerable importance in that it lends itself to supporting the general autonomy of the students. If each unit or set of units is provided with a kind of product declaration including statements of the objectives, the availability of sufficient numbers of units on related topics will allow individual students to select their own study objectives, their study method (by weighing distance

study against other methods) and, as is common in distance study, the pace of study.

A self-contained course in principle provides all the learning matter that is necessary. It has proved particularly valuable when the course content is fairly elementary and does not call for a study of different sources. Elementary courses in foreign languages can serve as typical examples. Such courses are complete in themselves and provide texts, grammar, vocabulary (with so-called synonyms), phraseology, phonetics, pronunciation exercises, exercises in composition, translation etc. Other proficiency subjects, such as mathematics, are usually taught in the same way at a distance.

Sometimes, however, students must be made to see a complicated picture of a subject with conflicting theories and views, or they have to learn how to trace facts and arguments from different presentations and to study various sources critically. In such cases, self-contained courses may not offer the best solutions. Instead, a study guide steering or facilitating the study of set texts is usually more suitable in that it causes students to read and/or listen to presentations of various kinds, to compare and criticise them and to try to come to conclusions of their own. This study-guide approach is generally practical when the learning is to include part or the whole of the content of various books, papers, and other sources of knowledge. Cf. Holmberg 1977, Ljoså 1975, Weltner 1977).

Evidently study guides, like self-contained courses, can be and are used in different manners. Du Plessis underlines that

> study guide design should afford individual students the opportunity of developing their own learning styles. Once they have identified the teaching objectives, they should find, and be able to use, multiple access points to the subject matter. The study guide should enable students to keep to the order of presentation if they wish, or to select areas they consider relevant, skip material they have already encountered and do not wish to repeat, or evaluate themselves on any section where they wish to ascertain their

> standing, even if they do this before studying the relevant part in any great detail. It follows that study guides can hardly be 'too easy' in this regard. They should, however, provide a measure of 'difficult' work as well by, for example, inserting appropriate self-evaluation questions that challenge even the best of students.
>
> (du Plessis 1987 p. 13)

Study guides should, preferably, in the interest of plurality, encourage students to use a number of different sources. This usually necessitates the availability of library services. A second best is the use of specially prepared readers which contain contributions representing different approaches. This practice evidently tends not to diminish interest in library facilities. On the basis of research by Winter & Cameron, Jevons states:

> Where books of readings are supplied as well as study guides, students make more use of almost every other source of library material or information than do students who do not get readers. Their appetite is whetted rather than satiated.
>
> (Jevons 1984 p. 32)

Making regular use of scholarly papers in periodicals is one way both of making students aware of different approaches with possibly conflicting views and of keeping courses up to date. Reprinting, with due permission, suitable articles for distribution among students is a procedure apparently widely adopted, for example in Australia where copyright legislation seems less restrictive to distance education in this respect than in most other parts of the Western world (cf. L. Moore 1987 p. 26).

The learning can also be organised on the basis of individual students' and tutors' predilections, needs and interests. This means removing the choice of subject-matter from the preparation to the very teaching-learning process: tutor and student agree on which course literature is to be selected, what tutor support is required etc. This is what happens in contract learning, which

inevitably stresses tutor-student interaction more than many other applications of distance education.

Since 1836, London University has acted as a pioneer in this field by conferring degrees on students who have not attended any of its classes but have prepared themselves for examinations in other ways (Tight 1987 p. 51). Individual tutoring is based on the study of literature prescribed or agreed between the professor and the individual students. Recent developments along this line have occurred in the contract learning initiated in the USA by Empire State College, NY (cf. Coughlan 1980, Worth 1982), in a diploma curriculum at the North East London Polytechnic (Bradbury et al 1982, Hinds 1987), and at Murdoch University in Western Australia (Marshall 1984). The individual student exerts strong influence on the objectives of his/her study. In these cases, distance education is characterised by adaptability to students' needs and wishes, not only as far as time and methods are concerned. These are applications of far-reaching student independence at all levels.

Similar activities occur as parts of otherwise more pre-structured courses of study. They are then usually referred to as projects. The higher the level of study, the more important is the project work (cf. Bynner 1986).

Thus, distance education serving plurality and student autonomy - both in my view extremely important in continuing education - is not only possible but occurs in practice. If these are our aims - and I believe they should be - the problems connected with structure and sequence (cf. Holmberg 1989b p. 57 ff) need not concern us as much as when rote learning is concerned. In the cases where problem-solving is the core of the learning matter, the order of presentation will evidently not be hierarchical, as no ready-made edifice of knowledge is to be presented. Here, the beginning is made by the problem and the search will be made along the lines of scholars who have looked for and finally found solutions. Their search can then also be followed when they make errors and correct them, which implies learning by 'conjectures and refutations' (Popper 1963).

Under the circumstances mentioned also the choice of media is less problematic than in study preparing for in detail prescribed goals. However, there are reasons to consider what Kathleen Forsythe calls the generative and degenerative effects that a medium may have. 'A degenerative effect would be one that inhibited conversation. This could be effected by stifling the imagination or isolating the participant from conversation' (Forsythe 1986 p. 23). She refers to criticism of television in this context and underlines the necessity to choose and use media in a way that encourages creativity and to avoid 'feedback information in closed loops'(p. 24). This is particularly relevant to the use of computer technology, which often causes programming in advance. Forsythe rejects this as negative to 'the variety so necessary for learning' (ibid.).

Readability as a result of style, legibility based on typography and illustrations are ubiquitous concerns on which there is much literature. For reasons of space I here only refer to my book of 1989 (1989b) pp. 77 - 91 for references.

Among new tools serving tutor-student and student-student interaction I will briefly refer to teleconferencing and computer communication.

The use of the telephone for seminars has proved successful in a number of cases. This is what is usually called teleconferencing[5] but should perhaps be called audio teleconferencing, as it is possible to include video elements in the wider concept of teleconferencing. The cost of these does not always seem to correspond to the educational value added by them. Teleconferencing makes discussions between students possible at the same time as it gives the tutor opportunities both to moderate the discussion and to make his/her own contributions. It can thus

5 'Teleconferencing is the bringing together by electronic means of three or more people in two or more locations to share a common discussion. It is generally understood to include the use of two-way and one-way video (both full motion and slow scan), electronic blackboards, facsimile, computer graphics, radio satellites, and telephones. The most essential portion of all effective teleconferencing is good quality audio' (Robertson 1987 p. 122).

be a rewarding form of non-contiguous two-way communication (cf. Robertson 1987).

There are various technical methods for bringing about non-contiguous conferencing as an element of distance education. Computer-based communication occurs in several forms. Thus it is possible to connect students' micro-computers to a host computer in such a way that students can communicate directly not only with tutors but also with fellow-students. This is practised at Deakin University in Australia, for example (Castro 1987 p. 6).

Computer communication is being practised increasingly in distance education. Apart from computer-conferencing, on-line communication occurs in simulation exercises, mainly in business administration, and in the study of branched programmes. Experiments of interest have been made at The Open University, e.g. in the CICERO project (Lockwood & Cooper 1980) and viewdata/teletex, 'in which a television screen is linked to a telephone and hence to pages of data stored in a computer' (King, Sewart & Gough 1980 p. 14), as well as elsewhere (cf. Kaufman 1986).

Various kinds of progress have been made with the use of on-line systems (cf. Bates 1984 , Kaye 1985, Kurland 1986, Lampikoski 1984, O'Shea 1984). Combinations of micro-computer technology and telephone communication appear particularly promising. This applies to electronic mail, telefax systems and modern text processing of the type used by newspapers (when a contribution is typed by a correspondent at a distance from the printing-office to where it is transmitted electronically and where it may be changed or edited). Such developments would seem to belong to the most essential educational endeavours of today, as they facilitate individual and autonomous learning based on mediated diaogue that allows for critical discussion, i.e. a type of really liberal education irrespective of subject areas chosen.

The theory of distance education as applying to continuing education

Some theoretical approaches aimed at identifying essential characteristics of distance education are well known, including Charles Wedemeyer's liberal, individualising 'independent study'(Wedemeyer 1981), Manfred Delling's process model (Delling 1987; cf. Graff 1970), which may be compared with Kathleen Forsythe's learning system (Forsythe 1986), Otto Peters' view of distance education as an industrialised form of teaching and learning (Peters 1973, 1983 and 1989), Michael Moore's theory of independent study, classifying educational programmes on the two dimensions of autonomy and distance (M. Moore, 1973), David Sewart's support model called 'continuity of concern' (Sewart 1981) and Kevin Smith's student-centred small-scale approach (Smith 1975).

These and other theoretical analyses illuminate the basic character and varying applications of distance education. Only in part, however, do they meet the well-grounded requirements expressed by Desmond Keegan:

> A theory is something that eventually can be reduced to a phrase, a sentence or a paragraph and which, while subsuming all the practical reseach, gives the foundation on which the structures of need, purpose and administration can be erected. A firmly based theory of distance education will be one which can provide the touchstone against which decisions - political, financial, educational, social - when they have to be taken, can be taken with confidence. This would replace the ad hoc response to a set of conditions that arises in some 'crisis' situation of problem solving, which normally characterizes this field of education.
>
> (Keegan 1990 p. 5)

Attempts have been made to meet these tough requirements. As early as 1970, Kurt Graff developed a decision model on the basis of a study of the structure and process of distance education, but

concluded that the great problems are beyond calculation (Graff 1970 p. 54).

Hilary Perraton (1981, 1987) has ventured other suggestions as steps on the path toward a theory of distance education, and so has the present author in applying hypothetico-deductive methods. I have developed a theory based on an empathy approach which has generated a series of testable and, in fact, partly tested hypotheses. On this I can in this context only refer to my works of 1982 (with R. Schuemer and A. Obermeier) and 1989.

It is quite evident that for distance education oriented towards open learning and serving continuing education also some general theories of teaching and learning apply. We largely have to disregard those relying on behaviourist approaches, but can make use of cognitive theories. Ausubel's organiser model, the so-called structural communication, which is an exceptional type of programmed learning unrelated to the behaviourist stimulus-response theory and based on Gestalt thinking (which was originally developed by J.G. Bennett and A.M. Hodgson [Egan 1976]) and also, for example, Bruner's discovery-learning model are relevant here (cf. Bååth 1979).

Conclusion

Distance education has great potentials for serving adults continuing their formal and informal education. Like other types of teaching and learning it may simply make provision for prescribed learning, but can also serve the purposes of liberal education, plurality and personality development by catering for independent study and student autonomy. In the continuing education of highly qualified librarians, whose support is essential to scholars, those responsible for cultural activities and the general public, it is evidently the latter function of distance education that is of prime importance. Here distance education can serve open learning.

For this paper I have drawn on my book of 1989 referred to above and in my list of references (1989b).

REFERENCES

Bååth, J.A., (1979)
Correspondence education in the light of a number of contemporary teaching models.
Malmö: LiberHermods

Barker, L.J., Taylor, J.C., White, V.J., Gillard, G., Khan, A.N., Kaufman, D. & Mezger, R., (1986)
Student persistence in distance education: a cross-cultural multi-institutional perspective.
ICDE Bulletin 12, 17 - 36

Bates, A.W. (ed.), (1984)
The role of technology in distance education.
London/Sydney: Croom Helm

Battenberg, R.W., (1971)
The Boston Gazette, March 20, 1728.
Epistolodidaktika 1971: 1, 44 - 45

Bradbury, Ph., Hinds, E., Humm, M. & Robbins, D., (1982)
Innovations in independent study at North East London Polytechnic.
In Teather, D.C.B. (ed), *Towards the community university.* Case studies of innovation and community service, 48 - 68
London: Kogan Page

Bratt, J., (1977)
Engelskundervisningens framväxt i Sverige. Tiden före 1850.
Stockholm: Föreningen för svensk undervisningshistoria

Bynner, J.M., (1986)
Masters teaching in education by distance methods.
Distance Education 7, 1, 23 - 37

Castro, A., (1987)
Teaching and learning as communication: the potentials and current applications of computer-mediated communication systems for higher distance education.
A Unesco conference document
Geelong: Deakin University

Coughlan, R., (1980)
The mentor role in individualized education at Empire State College.
Distance Education 1, 1, 1 - 12

Cross, K.P. (1976)
Accent on learning.
San Francisco and London: Jossey Bass

Delling, R.M., (1987)
Towards a theory of distance education.
ICDE Bulletin 13, 21 - 35

Delling, R.M., (1966)
Versuch der Grundlegung zu einer allgemeinen Fernunterrichtstheorie.
Epistolodidaktika 1966: 4, 209 - 226

Egan, K., (1976)
Structural communication.
Belmont, Calif.: Fearon

Foks, J., (1987)
Towards open learning.
In Smith, P. & Kelly, M.(eds.) ,*Distance education and the mainstream.*, 74 - 92
London: Croom Helm

Forsythe, K., (1986)
Understanding the effectiveness of media in the learning process.
Paper presented at the World Congress on Education & Technology in Vancouver, May 1986.
Victoria: Learning Systems Knowledge Network

Graff, K., (1970)
Voraussetzungen erfolgreichen Fernstudiums. Dargestellt am Beispiel des schwedischen Fernstudiensystems.
Hamburg: Lüdke

Hinds, E., (1987)
The school for independent study and international links.
ZIFF-Papiere 69
Hagen: FernUniversität

Holmberg, B., (1977)
Das Leitprogramm im Fernstudium.
ZIFF-Papiere 17
Hagen: FernUniversität

Holmberg, B., Schuemer, R. & Obermeier, A., (1982)
Zur Effizienz des gelenkten didaktischen Gespräches.
ZIFF-Projekt 2.6, Schlußbericht mit einer englischen Zusammenfassung (with an English summary).
Hagen: FernUniversität, ZIFF

Holmberg, B., (1986)
Growth and structure of distance education.
Beckenham: Croom Helm

Holmberg, B., (1989)
The concepts and applications of distance education and open learning.
International Journal of Innovative Higher Education 6, 1 and 2, 24 - 28

Holmberg, B., (1989)
Theory and practice of distance education.
London/New York: Routledge

Jevons, F., (1984)
Distance education in mixed institutions: working towards parity.
Distance Education 5, 1, 24 - 37

Kaye, T., (1985)
Computer-mediated communication systems for distance education. Report on a study visit to North America.
Milton Keynes: The Open University, IET

Keegan, D.J., (1990)
Foundations of distance education.
London and New York: Routledge

King, B., Sewart, D & Gough, J.E., (1980)
Support systems in distance education.
Open Campus 3, 13 - 28

Kurland, N.D., (1986)
Computer communications - a new tool for distance education.
In van Enckewort, G. et al., *Distance higher education and the adult learners.*
Heerlen: Open Universiteit

Lambert, M.P., (1983)
New course planning. The strategy and tactics of developing a home study course.
Washington: National Home Study Council

Lampikoski, K., (1984)
Boosts from computers in distance education.
Epistolodidaktika 1984: 1&2, 58 - 73

Ljoså, E., (1977)
Course design and media selection - some implications on co-operation between broadcasting, publishing and distance-education organizations.
Epistoladidaktika 1977: 1, 75 - 84

Ljoså, E. & Sandvold, K.E., (1983)
The students freedom of choice within the didactical structure of a correspondence course..
Epistolodidaktika 1983:1, 34 - 62

Ljoså, E., (1975)
Why do we make commentary courses?.
In Ljoså, E.(ed.), *The system of distance education,* 112-118
Malmö: Hermods, ICCE

Lockwood, F. & Cooper, A., (1980)
CICERO: computer-assisted learning within an Open University course.
Teaching at a Distance 17, 66 - 72

Marland, P.W. & Store, R.E., (1982)
Some instructional strategies for improved learning from distance teaching materials.
Distance Education 3, 1, 72 - 106

Marshall, L. (ed.), (1984)
Independent study contracts.
Perth: Murdoch University

Moore, L., (1987)
The Australian law of copyright and its application to distance education.
Distance education 8, 1, 18 - 37

Moore, M.G., (1973)
Towards a theory of independent learning and teaching.
Journal of Higher Education, 44, 661 - 679

O'Shea, T., (1984)
Computer assisted learning in distance education.
Finn Spring Workshop 1984. A collection of conference documents. Also published in *Epistolodidaktika* 1984: 1&2, 44 - 57.
Helsinki: EHSC / Markkinionti Instituuti

Perraton, H., (1981)
A theory for distance education.
Prospects XI, 1, 13 - 24

Perraton, H., (1987)
Theories, generalisation and practice in distance education.
Open Learning 2, 3, 3 - 12

Peters, O., (1973)
Die didaktische Struktur des Fernunterrichts. Untersuchungen zu einer industrialisierten Form des Lehrens und Lernens.
Tübinger Beiträge zum Fernstudium 7
Weinheim: Beltz

Peters, O., (1983)
Distance teaching and industrial production: a comparative interpretation in outline.
In Sewart, D., Keegan, D. & Holmberg, B.(eds.), *Distance education. International perspectives,* 95 - 113
London: Croom Helm

Peters, O., (1989)
The iceberg has not melted: further reflections on the concept of industrialisation and distance teaching.
Open Learning, November 1989, 3 - 8

Plessis, P. du (1987)
'Can the tables be turned? Likelihood that distance teaching at university can be more effective than attendance teaching'
Papers 1, 9 - 18. Pretoria: University of South Africa

Popper, K., (1963)
Conjectures and refutations. The growth of scientific knowledge.
London: Routledge & Kegan Paul

Robertson, B., (1987)
Audio teleconferencing: low cost technology for external studies networking.
Distance Education 8, 1, 121 - 130

Sewart, D., (1981)
Distance teaching: a contradiction in terms?.
Teaching at a Distance 19, 8 - 18

Smith, K.C., (1975)
External studies at the University of New England. An exercise in integration.
In Ljoså, E.(ed.), *The system of distance education* 1, 161 - 169
Malmö: Hermods/ICCE

Thorpe, M., Grugeon, D. & (eds.), (1987)
Open learning for adults.
Harlow/Essex: Longman Group UK Ltd.

Tight, M., (1987)
London University external developments.
Open Learning 2, 2, 49 - 51

Wedemeyer, C.A., (1981)
Learning at the back door. Reflections on non-traditional learning in the lifespan.
Madison: University of Wisconsin

Weltner, K., (1977)
Die Unterstützung autonomen Lernens im Fernstudium durch integrierende Leitprogramme.
ZIFF-Papiere 17, 2 - 42
Hagen: FernUniversität, ZIFF

Worth, V., (1982)
Empire State College/State University of New York Center for Distance Learning.
DERG Papers 7
Milton Keynes: The Open University

IFLA

'Workshop Education and Training with CPE 'New challenges'

152 - TRAIN-9 / RTCPE-7 (WS) E

CPE on the Management of Change in Academic and Research Libraries

RIITTA MÄKINEN

IR053483

or internal use only:
eting No: 203
: ~~yes~~/no

CPE on the Management of Change in Academic and Research Libraries

The objective of this paper is to outline both a continuing education program and new challenges and perspectives for the 1990's.

At this point, I will concentrate on that aspect of continuing education which is directed at influencing the librarian's comprehensive orientation to work and at helping him or her become, as Hans-Peter Geh specified some years ago in a CPE situation, "an active, progressive, self-motivating, flexible person, willing to accept change and capable of functioning in an at times hostile and often unstable environment."

Professional continuing education which focuses on these issues is appropriate after adequate CP training in new basic skills has been offered. In other words, new skills can be learned in short courses while the actual continuing professional education process requires programs of a longer duration. This paper develops a pedagogy for long-term programs.

My first objective is to describe the frame of reference for my concept of continuing education programs; in my observation, the Finnish organizational approach to continuing education is fairly rare outside Finland. In our tradition, special continuing education centers work together with higher education institutions.

Secondly, I will consider the effectiveness, or carry-over, of continuing education.

My third goal is to present the essential features of a CPE program and to address the problem of carry-over.

Finally, I will compare these experiences with the experiences of my colleagues and with the trends in the field both in our own organization and on a broader scale.

1) A Continuing Education Center, The Finnish Approach to Organizing Continuing Education

My work place, the Center for Extension Studies at the University of Tampere, is a department with a staff of 60, which operates under the auspices of the university. Its two primary tasks are to organize professional continuing education in fields represented in the university and to organize Open University Teaching. By tradition, our university has a fairly strong social sciences orientation. One of these traditional fields is librarianship, or library and information science, as

it is called today; the University of Tampere is the most important library training school in Finland.

In our university, as in other universities in Finland, the departments do not organize continuing education for former students; these courses are only offered through special continuing education centers. The individual departments do play a critical role in teaching work, and they contribute to curriculum planning for continuing education courses.

The Center for Extension Studies offers a wide range of professional continuing education courses, from two-day workshops to qualifying programs for professionals which last several years.

Half of our staff are planning experts with academic training, most often in such fields as journalism, social work, and business management. My full-time responsibility is to plan and organize continuing education for library and information science professionals throughout Finland. My duties do not include teaching.

Many offices and institutions organize continuing education for librarians in Finland, but I am the only person doing this on a full-time basis. In the nationwide scheme for advanced training courses for librarians, the University of Tampere Center for Extension Studies therefore focuses on arranging high-level programs of a longer duration. Organizations, regional library officials, and other training organizers offer courses of a short inspirational and information opportunity nature.

2) The Issue of the Effectiveness of Continuing Education

The key issue in continuing education is effectiveness. The literature with respect to this issue is often quite pessimistic, and maintains, for example, that only 10% of the investment in training carries over into actual behavioral change.

(In fact, it's my belief that we can only properly measure learning that involves truly new information, for example, an exotic new language. When newly-learned information is embedded in old information in a kind of a conglomerate, it can't be separated from original, or base-line, knowledge).

The literature often enumerates the barriers to the effectiveness of continuing education. As I see it, these barriers fall into the categories of the learner, the teaching, and the transfer of learning.

The Learner

Librarians have, almost without exception, a very positive attitude toward learning. Some of my colleagues have been responsible for courses which participants attended reluctantly or as a vacation activity. Low levels of motivation are, however, very rare at courses for library professionals. In course evaluations, participants occasionally mention that they "doubted their ability to learn anything new," but later noticed that they could learn even at their age. Sometimes, it also

seems that some people believe that in order to learn it is enough to merely hear information.

Prejudices or barriers with respect to the ability to study are rare among librarians. Deep-seated barriers to initiative and to personality and organization development through learning exist in many settings, and I will return to this theme at the end of my paper.

The Teaching

The majority of our educators are already university instructors and researchers or distinguished professionals in their fields. For them, taking part in continuing education is extra work, which is not especially well-paid. In general, it follows that when such a person agrees to teach in a CPE program, he prefers to rely on materials he prepared in the past. Often these materials can be adapted to the needs of the situation quite effectively, but not always. As a consequence, the relevance of teaching can be less than optimal.

The Transfer of Learning

As I see it, the weakest point in the effectiveness of continuing education is the limited probability of transfer of learning. Even in the case when training has full relevance from the standpoint of competence on-the-job, a lukewarm response from a superior and co-workers can easily discourage any reforms that might result from continuing education courses. Unresponsiveness is not necessarily intentional. If the course participant is not highly placed in the hierarchy at his work place, it will be difficult for him to find an audience for his information, and it's even more difficult to change the organizational structure and resource allocations with respect to what effective implementation of the new information would entail.

3) The Management of Change-The Objectives and Special Features of the Programme

3.1 Background

In the 1980's, the Center for Extension Studies designed a continuing education program specifically for research librarians. The lecture-based programme, which was offered twice, included six five-day sessions, for a total of 30 days, over the course of the academic year. The objective of the programme, which was designed for librarians who had been working in their field for years and who had perhaps handled specialized tasks, was to offer a forum for up-to-date general knowledge in the field and the opportunity for librarians to consider and evaluate their own professional role and work practices.

To this end, the program was fairly successful. Quite of few of the course participants progressed in their careers either vertically or horizontally, and the overall outcome was that professional self-esteem and initiative were enhanced. However,

the relevance of the program and prospects for carry-over in the work place were not as promising as might have been hoped.

The program planners were left with the challenge to create a subsequent educational program for research librarians which was based to a greater extent on the contributions of the course participants and which was more responsive to the library's current situation.

The indefinite nature of this challenge presented difficulties. An advisory committee was created which included several prominent directors of academic libraries and a lecturer of library and information science. The committee made a significant contribution by pointing out the trends, challenges and needs that continuing education should address. They also helped to formulate the aims and basic structure of the program. The committee recommended that the target group for continuing education should be middle management, librarians in senior positions, and directors of small library units. Although they sometimes lack management training and experience, individuals in these positions bear much of the responsibility for implementing various changes, for example, new automation systems (one common system will soon be operational in nearly all the 20 academic libraries in Finland).

The schedule for the CPE program, including its special features, is included in the appendix.

3.2 Participation Model

For optimal benefit, each library taking part was asked to send at least two participants. One participant was to take part in the entire educational program, including the seminars, while the second participant would only attend the lectures. The "principal" participants would be responsible for any reports and written assignments, while the "auxiliary" participants would provide assistance. The point of this arrangement was to address the challenge of how to make new ideas heard in an organization. The written work, which was a significant part of the curriculum, would also be more beneficial if more than one person shared the task.

The training program was open to any research library for a fee of 2000 FMK ($450 US) for each principal participant and 500 FMK for each auxiliary participant. We were able to accept the 24 people (11 principal and 13 auxiliary participants) who applied for the course.

(Three libraries ranging in size from one very small unit to a larger library could only send one principal student apiece. One library sponsored five auxiliary participants. Two of the three solitary principal participants complained about this situation).

3.3.Addressing Current Needs in the Library

Another feature of the program facilitated the carry-over of CPE to the work place. Each library which the participants represented had to specify a current change which they could work on during the program, with a view to applying theory to practice. This change was to be specified by the participants and library leadership together; when teaching began on project work, another written assignment was requested from the participant's superior.

The extent to which these features facilitated transfer of learning will be clarified next winter when we complete our delayed evaluation of the program.

3.4 Highly Qualified Instructors from Fields Outside the Library Profession

Much of the instruction was offered by professionals outside the field of library science. This was a necessity that turned out for the best. The university staff in the relatively new field of library and information science is so involved with students and the need to "publish or perish" that they are less than enthusiastic about participating in CPE. At the same time, their specialties are often outside the areas needed in CPE. In fact, several lectures were given by prominent librarians, and one of the two chairmen of this course, Teodora Oker-Blom, is a librarian and former lecturer in librarianship. Even so, the information covered during the program was often outside their spheres of expertise.

The contribution of Dr. Markku Kiviniemi, the director of research at the Administrative Development Agency, was especially useful, as was the information shared by Dr. Juhani Kirjonen, a specialist in occupational psychology who is researching and developing new teaching methods for personnel in government administration. Specialists from outside the profession offer new perspectives which help us see libraries as part of the community rather than as an end in themselves.

Overall, a lack of familiarity with library processes on the part of the instructors is an advantage. Participants have to be more explicit about the how and why of library functions, and the process of explanation helps clarify the issues. And it is, in fact, beneficial to "adapt" instruction to the library situation. This process encourages reflection rather than mere acceptance of the authority's information.

3.5 Evaluation and Critique

The participants evaluated each stage of the CPE program. After the preliminary assignment and first session, the overall conclusion was that the participants had gained a new perspective and practical understanding of the situation in their own libraries. Among the problems noted was the so-called "daily grind," which prevented in-depth development work and the study of new topics. One participant also felt that the connection between change as a concept and a concrete manifestation did not

materialize.

The objective of the program was to provide an interdisciplinary approach rather than a theoretically uniform frame of reference. Our intention was to offer various approaches to the management of change.

In addition, we were not able to establish clear instructions and criteria for the seminar work. For its whole duration, the program was subject to design constraints which caused a degree of uncertainty and tentativeness for all parties involved. While the chief instructors expected papers that were, to some extent, thoughtful and academic in grasp and form, the needs of the libraries precluded work in anything but a practical mode. Furthermore, the instruction on the project method was so effective that the majority of the final papers were written in a project report form.

In our group discussions, however, the participants indicated that they had thought seriously about change and the future role of libraries, even though their seminar papers did not register this thinking.

Although the seminar groups were small, the feasibility of practical guidance on implementing change was limited.

All in all, the transition from theory to practice, while less than ideal, was more effective than in many other courses. The participants expressed their satisfaction in the final evaluation at the end of the course; they were especially satisfied with the seminar work and the fact that professionals from the same library could participate. As a result of the broader involvement of personnel, information and advisory meetings on relevant change were held in many libraries.

Some of these experiences could be used to improve this course if it were held a second time. Surprising as it may seem, I have observed that the revised version of an educational program is not necessarily much of an improvement. The course can lack spontaneity, a pioneering spirit, and the opportunity for participants to be openly critical.

4) Conclusions

Although there is a precedent in our continuing education program for courses in library studies which involve accompanying work by participants, this is the first time that the this work has been such a central feature of the course. I know that other institutions have organized similar training programs for librarians; in our own department such programs for other professional groups have also been held.

For almost all part-time students, time resources are particularly problematic. One of our participants took an official leave without pay in order to draft a development plan for his library in the peace of his home! If the program were longer than an academic year, changing circumstances could make it more

difficult to participate. In our course, ten out of eleven final reports were completed according to plan.

When the primary intention of study is to improve the organization rather than enhance the student's personal qualifications, the organization must ensure study opportunities. If the objective is to stimulate significant change and raise standards, occasional continuing education for one or two students is hardly adequate.

Staff development is one of the basic functions today of organization planning. These activities include the orientation of new staff, on-the-job training, preparation of training materials, supervisory counseling, and seminars and workshops.[1]

For development to be real, it is not enough to circulate existing information. Moral and intellectual resources are needed on the part of the staff; these resources remain hidden and undeveloped if the work organization is rigidly hierarchical and especially if control rather than encouragement is the motivation for work. For the staff to bring about real advances, a development model for an organization must be such that work, work-related study, and work place development in response to study are in a state of constant interaction.[2]

The challenge in the 1990's for institutions organizing CPE is to help libraries help themselves to create a situation which fosters a constant interaction between work and study in the library field. Along with traditional courses, a network of consultants would also be helpful. Although librarians are trained as consultants, the contribution of professionals outside the field would be invaluable. As they did in the programme the Management of Change, professionals can offer a new perspective and help libraries find their own solutions.

For 20 years, modern prevailing trends in adult education have converged to ensure that the adult as a student is a subject rather than an object.[3]

The role of the educator, expert, or authority in more-or-less self-directed learning is still open for discussion and development. Another issue that could arise has to do with a collective system for work development; is it possible that this system could play the role of some kind of local collective bargaining agent instead of or besides the unions?

Professor Juhani Kirjonen, an expert on occupational psychology and one of the chief instructors in the Management of Change program, has begun a wide-ranging research and development program entitled, "Research-Training-Development." It is an attempt to address the issues mentioned above. The project has as a general objective the creation of a model which links research, training, and development work on-the-job. One of my colleagues, Karin Filander, is taking part in the project. She is conducting research on how learning and teaching methods can promote "emancipation" on the human and professional level.

The new perspectives for continuing education are without limit.

It is important to set some limits for our work, and I would cite one of the points of departure for my colleague's research: "How can we help adults recognize their own resources and, at the same time, set appropriate limits for learning objectives?"

It is my hope that those of us who are organizing CPE can succeed in this area as well, since we are, after all, facing tremendous challenges!

Notes

[1]Jane Robbins, "Research Skills for Research Librarians: A Report on and Examples from an Educational Program," The Journal of Academic Librarianship, Vol. 15, No. 1: 4-6.

[2]Many examples of this approach to the issue are included in a report on a continuing education program.
J.C. Phillips, G. Freimer, and D.D. McLean, "A New Direction for Continuing Education," The Journal of Academic Librarianship, Vol. 13, No. 6: 340-344.

[3]These trends have been stated concisely in previous Round Table Seminar papers:
M. Kent Mayfield, "Breaking the Barriers to Learning: Practical Applications of Current Research. In Continuing Professional Education for Library and Information Service Personnel," Papers from a seminar held at Matica slovenská, Martin, Czechoslovakia, October 10-13, 1988.

THE MANAGEMENT OF CHANGE -EDUCATIONAL PROGRAM

SESSION ONE--OCTOBER 10-12, 1989

SOME PERSPECTIVES ON CHANGE

Session Chairman: Markku Kiviniemi, Director of Research at the Administrative Development Agency

With: Teodora Oker-Blom, librarian for the Public Health Department

Objective: To provide participants with the tools to examine on a scientific basis the situation in their own library as it relates to the overall changes in the working environment and the dynamics of public administration.

Tuesday, October 10

10:45 Opening Remarks, Introductions, Presentations

12:15 Lunch

13:15 Trends in Research Policy and University Departments
Chief Officer from the Finnish Academy

14:45 Coffee

15:15 Features of the Development of Government Administration
Session Chairman

16:00 The Dynamics of Organizational Change
Professor of Public Administration

Wednesday, October 11

8:30 Summary of Advance Assignments
Session Chairman

9:15 The Management of Change From the Standpoint of Occupational Psychology
Professor of Occupational Psychology

11:30 Lunch

12:30 Continuation of 9:15 Session

13:30 Coffee

14:00 Current Issues in Government Administration
Session Chairman

15:00-16:00
Explanation of New Assignments
Session Directors

Thursday, October 12

8:30 Computer Technology, Work, and Organizational Changes
Professor of Computer Science

11:30 Lunch

12:30 Summary and Discussion

13:30 A Survey of the Problematics in the Management of Change in Research Libraries Abroad
Lecturer of Library and Information Science

15:00-15:15
Concluding Remarks
Chairman for Session 2

SESSION TWO, November 20-24, 1989

CHANGE IN LIBRARIES, PROJECT METHOD

Session Chairman: Teodora Oker-Blom

Monday, November 20

10:30 Opening Remarks, Feedback, and Discussion of Interim Work

12:30 Lunch

13:30 A Historical Perspective on Automation in Libraries and the Management of Changes
Director of the Parliament Library

15:00 Coffee

15:30-17:00
Some Ideas on the Implementation of Computers in Libraries from Someone Who Has Seen It All
Planner from the Automation Unit of Finnish Research Libraries

Tuesday, November 21

8:30 Financing Research Libraries
Director of Libraries at the Tampere University of Technology
Case Study and Exercises
Seminar Chairman

12:00 Lunch

13:00 The Relevance of Various Organization Models for Libraries
Director of the University of Jyväskylä Library

18:00 Group Discussions

Wednesday, November 22

8:30 Summary and Discussion
Seminar Chairman

9:30-17:00
Project Management Methods With Respect to Implementation Processes
Representative of a Consulting Firm

Thursday, November 23

8:30-16:00
Continuation of Project Method Work

Friday, November 24

8:15 Summary and Evaluation

9:45-14:30
Seminar Preparation (Lunch around 12:00)
Seminar Chairmen

SIX-HOUR WORKSHOPS IN FEBRUARY, MARCH, AND APRIL

Three Workshops for "Principal" Students, 2 Groups with 5-6 Participants and 2 Instructors and a Planning Officer

SUMMARY SESSION, May 24-25, For all participants

10:30 Opening

10:45 Measuring Library Operations
The Views of a Working Librarian

11:15 Commentary Discussion
One of the Participants

12:15 Lunch

13:00 Changes in Acquisition and Cataloguing

13:45 Coffee

14:15-16:00
Commentary on Library Automation from an Automation Unit Planner
Discussion

Friday, May 25

8:30 Summary and Conclusions from Seminar Reports

9:30 Overview of the Challenges of Information Organization and Public Administration
Seminar Chairman Markku Kiviniemi

11:00 Lunch

11:45 Problematics of Implementing Automation and Replacing Old Systems
One of the Participants

12:15 The Computer and the Work Place
Professor of Computer Science

13:45 Visions of the Future
Seminar Chairman Teodora Oker-Blom and One of the Participants

14:30 Concluding Remarks

15:30 Awards Ceremony

IFLA

workshop: Education and Training with CPE - "New challenges"

153 TRAINING/RTCPE-8(WS)-E

U.S. GOVERNMENT SUPPORT FOR CONTINUING PROFESSIONAL EDUCATION FOR LIBRARIANS

by

Anne J. Mathews and Thomas C. Phelps

IR053483

r internal use only:
eting No: 203
: yes/no

U.S. GOVERNMENT SUPPORT FOR CONTINUING PROFESSIONAL EDUCATION FOR LIBRARIANS

by

Anne J. Mathews and Thomas C. Phelps

The U.S. government supports the professional education of librarians through a variety of legislated programs. However, only two of these federal funding programs are targeted specifically for library and information science education. Other federal funding sources support grant programs for purposes other than libraries, but libraries and librarians may participate in them. This paper describes the two major programs supported by U.S. congressional appropriations and administered by the U.S. Department of Education, as well as one other federal funding source, the National Endowment for the Humanities.

U.S. Department of Education

The U.S. Department of Education oversees the funding programs legislated exclusively for libraries. Within the Department, the Office of Library Programs of the Office of Educational Research and Improvement, carries out this responsibility, administering both the Library Services and Construction Act (LSCA) and Title II of the Higher Education Act (HEA II).

The Library Services and Construction Act supports

- public library services, especially to underserved populations
- public library construction
- networking and interlibrary cooperation
- library services to Indian tribes, Alaskan native villages, and Hawaiian natives
- adult literacy programs in public libraries.

The Higher Education Act, Title II, provides funding to:

- strengthen major research libraries
- promote and develop exemplary uses of technology for resource sharing and networking in colleges and universities
- promote research and demonstration projects on library and information science issues
- advance the education of librarians through fellowships and training institutes.

While library career training is a specific program under HEA II, professional education for librarians is not a designated purpose of LSCA. However, training is an eligible expenditure under the LSCA if it supports the purposes described in the legislation.

Higher Education Act

The purpose of the Library Career Training Program, Title II-B of the Higher Education Act, is to provide grants to institutions of higher education, and other library organizations or agencies, to train persons in librarianship; and to establish, develop, and expand programs of library and information science. There are two parts to the program: Fellowships and Institutes.

Since 1966, the Library Career Training Program has provided funds totaling $51,514,070 to assist 20,766 persons in training and retraining for library service.

The Fellowship program was established to alleviate the critical shortage of professionally trained librarians, and the serious shortage of graduate library school faculty. In the early 1970's, the program was redirected to recruit minorities to the profession, to facilitate upward mobility of women and minorities, and to enhance service to the underserved. To date $32,141,259 has been spent to support 16 bachelor's, 53 associate, 77 traineeships, 2,808 master's, 248 post-master's, and 1,101 doctoral fellowships.

The Institute program was established to provide long- and short-term training and retraining opportunities for librarians, media specialists, information scientists, and persons desiring to enter these professions. To date a total of 16,453 people have been trained through 435 institutes funded through grants totaling $19,372,811. Many of the institutes have given experienced practitioners the opportunity to update and advance their skills in a given area of librarianship.

The Library Career Training Program addresses the training needs of the library community in order to prepare librarians for service where shortages of qualified professionals are critical. The current priorities for the program include six broad categories. They are:

(1) To train or retrain library personnel in areas of library specialization where there are currently shortages, such as school media, children's services, young adult services, science reference, and cataloging;

(2) To train or retrain library personnel in new techniques of information acquisition, transfer, and communication technology;

(3) To increase excellence in library leadership through advanced training in library management;

(4) To increase excellence in library education by encouraging study in librarianship and related fields at the doctoral level;

(5) To provide advanced training in the development, structure, and management of new library organizational formats, such as networks, consortia, and information utilities; and

(6) To train or retrain library personnel to serve the information needs of the elderly, the illiterate, the disadvantaged, or residents of rural America.

Promulgating annual priorities allows the program flexibility by responding to the changing needs of library and information science training.

There is a strong interest in library education in the United States. For fiscal year 1989 approximately $400,000 was appropriated by the U.S. Congress for training activities under HEA Title II-B. However, there were requests for 144 fellowships totalling $1,509,500, and 19 applications for institutes totalling $949,022--a combined total of $2,458,522, or six times more dollars than were available.

All of the applications were reviewed by peer reviewers, who volunteered their time. Each application was reviewed by three persons. The three scores were then averaged, and all scores were ranked from highest to lowest.

When the results were tallied, 12 master's fellowships were funded for $129,600, and 10 doctoral fellowships were funded for $148,000--a total of $277,600. In addition, four institutes were funded for a total of $122,187.

Following are 4 examples of the 22 fellowships that were funded in fiscal year 1989:

Catholic University of America, School of Library and Information Science (Washington, D.C.) received a $10,800 grant to provide a fellowship for the Master's degree, training a student with a background in basic life sciences, specializing in science reference with an emphasis on biomedical sciences, an area of library specialization where there is a current shortage.

Indiana University, School of Library and Information Science used a $29,600 grant to support two doctoral fellowships--one specializing in implementing and evaluating

network technologies as they apply to a major research library, a major institution providing library and information science education, or networking for youth between school media centers and public libraries; and one specializing in public or school library services to handicapped youth and research methods which lead to new knowledge concerning the development, implementation, and evaluation of such services.

Louisiana State University, School of Library and Information Science was granted $10,800 to offer a fellowship for Master's level training in current forms of bibliographical control and fundamentals of database organization and management for application in a research, special, or public library.

University of Wisconsin-Milwaukee, School of Library and Information Science directed its $10,800 grant to support one Master's level fellowship toward preparing a student for a career in library services for children and young adults in an urban public library. The program of study included opportunities to work with practicing librarians, taking part in established service programs for children and young adults.

In fiscal year 1989 four institutes were funded:

Rosary College, School of Library and Information Science (Illinois) received a $28,280 grant for a one week institute to introduce 75 librarians to the issues, problems, and opportunities facing the management of networks.

Indiana University, Graduate School of Library and Information Studies used its $28,172 grant to sponsor a two phase summer institute--a three-day forum for library educators and a two-week session for school library media specialists and public librarians--on library services to youth with handicaps.

The Board of Education, Prince George's County (Maryland) applied its $31,815 grant to train 35 traditional school librarians as information specialists, emphasizing acquiring and managing information and technological change.

Oklahoma State Department of Education, with its $33,420 grant, supported an eight day institute to train 35 school library media specialists and five library educators in the application of microcomputers to library management, including the conversion of bibliographic records to machine-readable form and micro-based resource sharing.

The U.S. Department of Education training monies are awarded to academic institutions and libraries. Persons interested in receiving a fellowship or attending an institute apply directly to the grantee institution, which has the sole responsibility for selecting recipients or participants.

Institutions receiving grants do not require fellows or institute participants to pay tuition and fees. Stipends for fellowship recipients range from $5,400 for master's to $7,400 for post-master's and doctoral level study. For fellowships, the institution receives an amount equal to the stipend to cover the cost of training and the cost of waiving tuition and fees.

Institutes' costs vary according to the length of time, number of participants, grantees' costs for personnel, support services, and other administrative costs.

Library Services and Construction Act

Since its creation in 1956 the Rural Library Services Act (now the Library Services and Construction Act) has allowed for the professional education of librarians. Most of the funding appropriated under LSCA goes directly to the States to support improvements in public library services, and resource sharing and networking. This program allocates money to the States based on their populations, and the program is administered by the State library agencies to meet the needs identified in their long-range plans. As long as education programs for librarians meet the State's identified needs as well as the criteria established for LSCA (e.g., for Title III, the program must support more than one type of library), they can be supported in whole or in part by LSCA funds.

Examples of professional education programs for librarians supported by LSCA grants (Titles I and III) to the States include:

In Massachusetts, a $25,000 Title I grant supported two regional workshops aimed a strengthening management skills of public library directors and supervisors. Training included budgeting, team-building, performance appraisal, staff development, decision-making, time management, communication skills, and positive assertive management.

A large public library in Florida, with a grant of $27,075, trained its online searchers and key reference personnel in the use of various online systems such as DIALOG and BRS.

The Delaware Division of Libraries used $14,800 of its grant funds to hold two workshops on reference skills and business resources, and collection development. Thirty-six librarians attended the workshops, which were offered for certification/ recertification credit.

A library cooperative in California received an $8,070 grant to help sponsor the Third Pacific Rim Conference on Children's Literature in cooperation with the California Association of the Teachers of English, the Children's Film and Television Center of America, and the Graduate School of Library and Information Science at the University of California at Los Angeles. The conference brought together distinguished authors, librarians, and other persons working in the field of children's literature from North and South America, Asia, and the Pacific.

A library cooperative in Virginia, using a $5,400 Title III grant, conducted workshops on four topics of interest to local librarians--public relations for library personnel, gift materials, cataloging of audiovisual materials, and business reference sources and services. A total of 188 people from 18 libraries, including school, public, academic, hospital, and special libraries, participated.

In New York, a local library council received a $16,438 grant to develop a training program for coordinated collection development in allied health sciences and to produce a regional plan for all types of libraries. The librarians were trained in collection assessment procedures and techniques, analysis of user needs, identification of interlibrary loan patterns, and interpretation of the data from the OCLC holdings tapes for participating libraries. Participants learned to collect and develop more meaningful statistical data on the usage of their collections.

To help supply professional librarians to areas with inadequate services, the Arizona Department of Library, Archives, and Public Records has used Title I funds to support advanced professional training in public librarianship. Once an individual participating in this program has earned his Master's in Library Science degree, he is assigned to a selected public library in Arizona to work for two years.

The California State Library used Title I funds to further its minority recruitment program for librarians. "Transition into Management" was a one-week middle management seminar for ethnic librarians who had been in the field at least three years and desired to move into middle management positions. Out of 30 applicants, 10 participants--5 black, 2 Asian, 2 Hispanic, and 1 American Indian--were selected to attend the University of California at Los Angeles seminar which covered a number of issues, including interviewing and resume writing, and offered opportunities to network with successful ethnic librarians.

Title IV of LSCA, is a grant program directly administered by the Office of Library Programs. It is devoted to supporting library services for Indian Tribes and Hawaiian natives. A number of tribes have used all or part of their grants to train personnel. For example,

The Three Affiliated Tribes of New Town, North Dakota, selected a tribal member to attend Clarion University of Pennsylvania to work on a Master's degree in rural librarianship. Having a qualified librarian with special training in library services to rural areas will improve services to the Tribes. Because the librarian is not a full-time student, the Tribes will use grants for several years to support the education program.

The Pilot Point, Alaska, Native Village used part of its grant to send its librarian to the Village Library Workshop. The workshop included such topics as basic library skills, library grant management, children's services, and policies and procedures for participation in the State interlibrary system. The Alaska State Library has sponsored the Village Library Workshop for several years to train personnel serving Alaskan Native Villages.

As more libraries participate in literacy activities, there is an increasing need to train more librarians to conduct literacy programs. Under LSCA Title VI, Library Literacy Program, many State libraries are training librarians to develop and implement literacy programs or provide particular literacy services. At the local level, public libraries are training librarians to carry out specific literacy projects. For example, some librarians are trained as tutors; others as tutor trainers; and still others in developing collections of materials for adult new readers.

Two examples of how Title VI funds are used for training follow:

One urban public library system in Florida, with a grant of $24,945, is training library staff and volunteers from 12 communities to provide literacy services that will be accessible to nonreaders and new readers.

The Oregon State Library used its grant of $25,000 to solicit applications from local libraries, select the 50 with the greatest need to establish literacy programs, and train the librarians and project coordinators in various topics related to establishing and managing local library literacy programs.

Other U.S. Government Funding Sources

Although the Library Services and Construction Act and Higher Education Act, Title II, programs are specifically targeted to libraries and the training of librarians, other government agencies also provide support for the training and education of professional librarians. The National Science Foundation, the Smithsonian Institution, the National Institute for Museum Services, the National Aeronautics and Space Administration, the National Trust for Historic Preservation, the National Libraries of Agriculture and Medicine, and the National Endowment for the Humanities are a few such agencies.

Appropriations from the U.S. Congress to these agencies include provisions for training librarians for collection building and maintenance in particular subject areas, for access, and methods of interpretation of collected works; and for strategies for research through particular resources. Such assistance allows the agencies to fulfill specific mandates or goals. Therefore, workshops, seminars, sessions, and conferences are often a part of continuing education supported by the U.S. government.

A closer look at the National Endowment for the Humanities demonstrates the types of training programs funded by such agencies.

National Endowment for the Humanities

To promote progress and scholarship in the humanities in the United States, Congress enacted the National Foundation on the Arts and Humanities Act of 1963 which established the National Endowment for the Humanities (NEH) as an independent grant-making agency of the federal government to support scholarly research, education, and public programs in the humanities. The term humanities includes the study of history; philosophy; languages; linguistics; literature; archaeology; jurisprudence; the history, theory, and criticism of the arts; ethics; comparative religion; and those aspects of the social sciences that employ historical or philosophical approaches.

While not specifically included in the Act of 1965, nor viewed as a discipline of the humanities, librarianship is a field of study useful to the humanities. Libraries collect, preserve, and maintain a major portion of the recorded cultural heritage and make it available to scholars and the general public. Because libraries and librarians are important to research and education in the humanities, they are important to NEH. Therefore, NEH makes grants to libraries for access to collections, for public education in the humanities using library collections, and for the preservation of collections.

Libraries play a primary role in research and public education in the disciplines of the humanities. Librarians--public, school, academic, and research--organize, house, care for, and assist in accessing materials, and facilitate the interpretation of material for the general public and for students. Therefore, it is some concern to NEH that librarians receive training and continuing education so that they are knowledgeable and skillful, especially as they perform work relating to NEH's mandate.

NEH makes direct grants to a variety of agencies and institutions, including libraries. Within grant requests, funds may be budgeted for the continuing education of librarians. Grants that will advance an understanding or appreciation of the humanities have been made to agencies such as the American Library Association, the Northeast Document Conservation Center; to universities such as Johns Hopkins or Columbia; or to

libraries such as the New York Public or the Newberry. Each of these grants has included training librarians to facilitate access to, interpretation of or the preservation and conservation of collections of materials vital for the study and appreciation of subjects, topics, themes and disciplines of the humanities.

For example, the American Library Association received a large grant to support a workshop for librarians and scholars in humanities disciplines from historically black colleges and universities. The workshop assisted participants in planning and conducting educational programs for the general public on themes and topics about black American literature and culture. During the workshop, collections were analyzed and topics, ranging from Langston Hughes to the Harlem Renaissance, derived from them. Both librarians and scholars were trained to interpret collections for the general public to help them better understand American culture.

Other examples of support for continuing education for librarians include grants for specific kinds of training. With NEH support, the following projects have been undertaken:

The American Antiquarian Society established an endowment for a professional conservator and an intern for the conservation of the Society's collection and for training other selected individuals in the conservational craft.

Columbia University set up a program for graduate instruction in conservation and preservation for librarians already advanced in their careers.

The Northeast Document Conservation Center developed field services to provide information and training for librarians, archivists, and curators on site at their own institutions.

Although NEH is not in the business of directly supporting continuing education for librarians, through indirect measures it offers support to libraries and institutions of higher education for the continuing education process.

Conclusion

The scope and variety of the training opportunities described in this article reflect the ever-changing and diverse nature of the library profession itself. Developments in technology, sophisticated approaches to information management, increased demands of researchers, and delivery of information through international data bases challenge educators and practitioners to prepare, train, update, and retool for more effective delivery of library services in the 21st century. In the United States, the federal government plays a major role in support of these needs.

IFLA GENERAL CONFERENCE STOCKHOLM 1990

Division: VII Education & Research

Section/RT: Education & Training: Continuing Professional Education RT

111-RTCPE-3-E

ADULT LEARNING IN STUDY CIRCLES

by

Henry Blid

Tutor

Brunnsvik's Folk High School

771 01 Ludvika, SWEDEN

IR053483

Keywords:

Study Circle

Adult Learning

or internal use only:

leeting No: 95

?I: ~~yes~~/no

Adult Learning in Study circles

ABSTRACT

"Adult Learning in Study Circles" takes a brief look at the historical development of "folkbildning" and study circles. It emphasizes the three beneficiaries of the circles, that is the individual participants, their organization, and the government. It discusses the approach used by the circles: their democratic principles, the use of a conversational mode instead of discussions, the importance of books for the learning, the need for planning toward action and change, and, finally, the role of the study circle leader. The paper makes reference to study circles in Sweden and in the United States.

Key words:
Study circle
Adult learning

Adult Learning in Study circles

ABSTRACT

"Adult Learning in Study Circles" takes a brief look at the historical development of "folkbildning" and study circles. It emphasizes the three beneficiaries of the circles, that is the individual participants, their organization, and the government. It discusses the approach used by the circles: their democratic principles, the use of a conversational mode instead of discussions, the importance of books for the learning, the need for planning toward action and change, and, finally, the role of the study circle leader. The paper makes reference to study circles in Sweden and in the United States.

Key words:

Study circle

Adult learning

ADULT LEARNING IN STUDY CIRCLES[1]

Study circles - this phenomenon forms an integral part of the culture of Sweden and the everyday life of its people. But the circle approach is common in the other Nordic countries and used all over the world.

The conceptual idea developed outside Sweden. England and its oxford Movement were often mentioned as being the source. Nowadays we are close to a consensus that the study circle has American roots and that the ideas can be traced back to the Chautauqua Literary and Scientific Circles[2] which reached huge numbers in the United States in the latter part of the 19th century.

Sweden experienced during that period the transfer from a backward, quite undeveloped country toward a modern society. But unlike most other countries in Europe, Sweden did not proceed from feudal or semifeudal conditions but from a mainly agricultural economy,to a large extent based on owner-farmer and freeholders. Historically, these farmers and freeholders have been powerful. They were part of the old Swedish parliament as were the clergy, the nobility and the bourgeoisie -- actually, the only parliament in Europe where owner-farmers have served as members since the 16th century. The positions of the other classes were, as a result, comparatively weaker.

The rapid population increase during the 19th century and its accompanying influx of village people to the cities resulted

in the cities having many inhabitants who were descendants from farmers and peasants. It should be noted that the illiteracy level in Sweden may have been comparatively low at that time due to, among other things, the 1842 legislation on primary schools.

Undoubtedly, the new urban inhabitants carried village traditions and attitudes to their new environment, of which the implications were observed first quite recently. To these belong strong feelings of joint responsibilities and social unity.[3] The increase of popular movements -- nonconformist churches, temperance organizations, labor movement organizations and cooperative societies -- cannot be fully understood unless a village tradition of solidarity and loyalty is taken into account.

These new popular movements struggled to maintain and develop their organizations. Their need for skilled board members for positions such as chairmen, treasurers and secretaries is a certified fact, as is also the reluctance of the "educated masses" to assist. The "uneducated" uphold a reciprocal suspicion. This mutual dislike can still be seen between workers and university graduates in Sweden. It prevented links to be established between the Swedish universities and the popular movements unlike the development in England the United States.

The Swedish idea of "folkbildning" (perhaps best defined as the growth and development of individuals and organizations free from any school system) developed in this environment and gradually led to the establishing of the modern study circle

movement in 1902. The concept of learning in study circles cannot be discussed unless this background is taken into account. The reliance by most study circles on books and self-directed learning rather than on the teaching by any expertise, such as teachers, can, of course, be interpreted as an echo of the Platonic belief that people can learn, reason and act intelligently without being told what to learn, what to think and what to do. But the development seems to be more of a refusal by ordinary people to succumb to any paternalistic intentions, however benevolent these may be, and of an ambition to stand on one's own feet. Actually, this attitude reflects traditional Swedish views on human dignity. The relatively strong positions of the organizations of the handicapped and the little influence exerted by the Swedish charitable organizations give additional evidence of this.

From the beginning, learning in study circles initially had two beneficiaries -- the individual learners and their organization. They depend upon each other. The individual participants come out of the learning more resourceful than before.[4] This means that the members not only become better informed but also more active and, consequently, make their organization more active and forceful. The American International Union of Bricklayers and Allied Craftsmen considers the study circles to be a key to a stronger union:

> The study circles are a means of expanding the education of the members, helping them to understand the Union, the industry, and groups and institutions outside our Union important to our future ... We are looking for members' best judgments which can come from open discussion with fellow members. We want all members to speak up, to be challenged, to respect the opinion of

> others, and to grow from experience. The result can be more informed, active, and self-confident union members and citizens, with renewed pride in their crafts, their union, and their stake in their organization's future.[5]

The study circles decide on their business but are simultaneously conscious of a loyalty to their organization. They provide the organizations with well informed members and important sources for future leaders. This results in vital organizations well prepared for the future and capable of taking good care of the interests of the members.

Although stiff formal patterns are avoided, democratic principles should always govern the study circle meetings. These principles go beyond the formal requirement "one person, one vote" by demanding that the opportunities to participate in the conversation should be equally distributed, and that those who are shy or have difficulties to participate should be encouraged and helped. Democracy cannot be learned from textbooks but by actually practicing it together with other people. Neither can human understanding be achieved by reading only. Social and democratic learning are accomplished as an integral and necessary part of the social interplay of the study circles.

Further, the climate for the learning shall be inquiring and inquisitive and not contesting; respectful and not pressuring.

Any learning in any subject or topic following these principles cannot but strengthen the democracy of the organization. This strengthening has further implications. it is, for example, agreed that the work of the Swedish study circles during the 1930s and 1940s actually prevented the totalitarian forces from achieving any influence worth

mentioning. Realizing this, the government increased its funding of the study circle and requested the organizers of the circles -- the national educational associations -- to extend their activities from member organizations to the public. Thus, we can say that the Swedish society became a third beneficiary of the study circle approach.

Study circle learning occurs in groups of people who can freely exchange experiences and knowledge with each other. People voluntarily come to the study circles. They bring with them varied personalities, experiences and backgrounds. They give different ideas, and are encouraged, often requested, to look at issues from different viewpoints. In this way, they learn from each other. The single-mindedness of most textbooks and the one-sided subjectivity so common for teachers are counteracted and balanced, as members are exposed to the different views and experiences of other participants in the study circle.

Learning in study circles consists of integrating facts, values, ideas and experiences, thus creating a cobweb of links and connections. The values and attitudes of the individual members are sometimes only passing whims. Sometimes they are so deeply rooted as to appear to be innate. On a closer examination, these "innate" attitudes most likely consist of subtle cultural inheritances resembling Jung's archetypes. The circle learning process links these elements not only to each other but also relates the individuals to his fellow-learners and their environment -- the present as well as the past ones.

A former director of studies at the Swedish Workers'

Educational Association (ASF) once described the learning process in study circles in a small pamphlet about the art of conversation. He identified three necessary steps: (1) Preparations at home by all individual participants before the session. (2) Self-activity by all during the session. (3) Self-activity after the session alone at home with books and notes. He discarded discussion as a mode of interaction. Instead he preferred conversation -- an exchange of views and information in a relaxed manner. "Is it possible for two or more ignorant people to talk so they can learn something out of it?" he asked, giving his answer as follows:

> The conversation should be a means to make every participant spiritually active. To talk is the same as to "think aloud." To participate in a conversation is to think aloud under control. One has to make one's knowledge clear by expressing it in the conversation. One has to revise and correct what is erroneous by making comparisons with other people's experiences.[6]

Learning in study circles includes, however, more than the individual acquisition of new knowledge, new ideas, new knowing, skills and attitudes and of unlearning -- that is the active discarding and forgetting of what is obsolete. It is a creative, human development process aimed at changing individuals and their environment. As well, it goes beyond the notion of individual, self-directed learning since people in study circles are collectively involved in an intensive interactive learning.

This collective process brings people closer to each other, furthers their skills to cooperative and develops their responsibility to the group, which they have formed with their fellow-learners. The circumstance that they are few -- quite

often no more than 8-10 people -- further contributes to their interaction.

The work of study circles is governed by intentions, not by decrees and certainly not by chance. These intentions must, however, come either from the participants themselves or they must be accepted by them. Consequently, the learning will be perceived by the participants as worthwhile. But for the work to progress according to the intentions of the participants, they require a plan for their work: "Here we stand, this we want to achieve, and that's the road we'll use."

The plan is the tool which the circle members use to secure a meaningful progress towards their goal. Such a requirement should not prevent the professional educator from finding that the learning which is worthwhile to the circle participants is also useful to him. The opposite, however, is not necessarily true.

The social interplay in study circles, combined with their guiding principles, will not only help people to overcome their isolation but also increase their knowledge and understanding of other people. They listen to the views and expressed attitudes of others. This interplay also helps members to respect varied opinions and others' dignity. It makes social and democratic learning an integral and necessary part of the learning process in those circles.

The procedures used by the study circles emphasize the equal position of all participants, the study circle leader included. The latter should be no teacher but the first among equals -- primus inter pares.

It is very difficult to describe a study circle leader's level of subject competence. No standard is known. They must, of course, have subject knowledge enough to make it possible for them to help the other members to progress. But big gaps between leaders and participants concerning subject knowledge often produce an undesired superior-inferior distance. This can, in turn, easily affect the unity negatively and undermine the basis for circle work.

The subject level differences among the members make the competence of the leaders an important issue -- not so much about their subject qualifications as from pedagogical and social points of view.

The role of the leaders will, thus, become more of organizers of learning than sources of knowledge. Good leadership includes interest in people, ability to listen, to take initiative,to encourage others and to help the groups to achieve what they aim at.

To quote once more from the International Union of Bricklayers:

> Democracy requires an ongoing dialogue between leaders and the people they serve. A modern trade union also has to create mechanisms for a dialogue with its members. That is what the study circles are all about.[1]

1. For a more detailed discussion, see:

Henry Blid. "Education by the people -- study circles." Arbetarnas Bildningsförbund. Stockholm, 1990. P.O. Box 522, S-10127 Stockholm.

Leonard P. Oliver. "To understand is to act. Study circles." Seven Locks Press, Cabin John, Maryland, 1987. P.O. Box 27, Cabin John, Maryland 20818, USA

2. One of the most important officers of the Swedish Lodge of the International Order of Good Templars, Edvard Wavrinsky, reported in 1893 of the CLSC movement in an IOGT magazine "Julbrasan."

3. A Swedish researcher into the history of ideas, Maciej Zaremba, has shown that old Swedish village traditions survive in existing political organizations. The cultural heritage carried by a native Swede is seldom discussed and most often taken for granted. It might be more than a coincidence that Zaremba has a Polish background. (M. Zaremba, "Byalagets diskreta charm eller Folkhemmets demkratiuppfattning" in "Dyu skona gamla varld" published by Sekretariatet for framtidsstudier/the Secretariat for the studies of the future. Stockholm 1987)

4. Borgström, Leona, and Oloffsson, Lars-Erik. "Participation in study circles and the creation of individual resources." Paper presented at the Adult Education Research Conference, Montreal, April, 1983. Department of Educational Research, Stockholm University.

5. BAC Study Circle Program: Organizing and Leading a Study Circle. Leader's Handbook. International Union of Bricklayers & Allied Craftsmen, 815 Fifteenth Street, N.W., Washington, D.C. 20005. 1987.

6. Gunnar Hirdman, "Samtalets knost, nagot om studiecirkelns metoder." Arbetarnas Bildningsförbunds Centralbyra, Stockholm 1945. 3:e omarbetade upplagan.

7. Building Union Democracy; The BAC Study Circle Program. Executive Summary of the Final Report of the 1986 Pilot Study Circle Program. December, 1986. Report prepared by Leonard P. Oliver.